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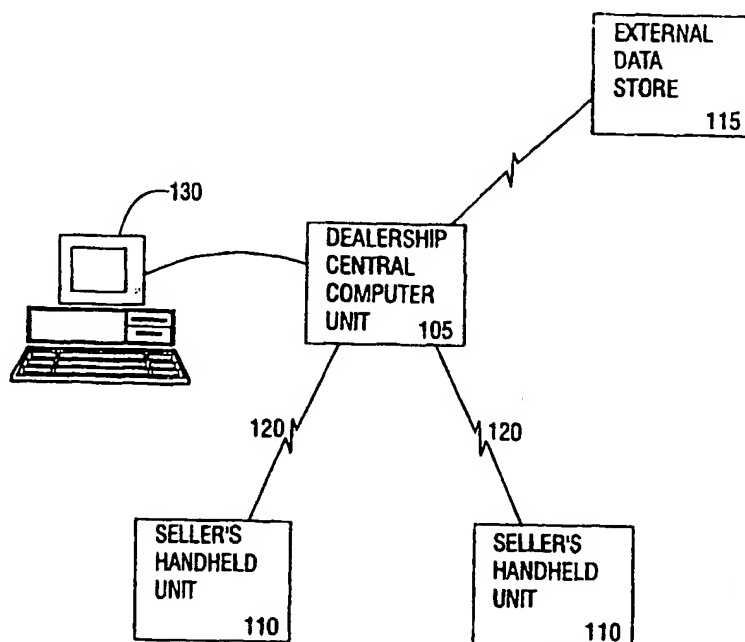
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(54) Title: PORTABLE SALES PRESENTATION SYSTEM WITH SELECTIVE SCRIPTED SELLER PROMPTS

(57) Abstract

A handheld computer unit for use by, e.g., a car sales person (seller) prompts the seller with a standard script to be followed at each step in the process after a prospect enters a dealership. The prospect's response to the scripted questions is used to identify the prospect's particular interests of a general nature, e.g., safety, and of a specific nature, e.g., trailer towing capacity. When either a general or specific interest is identified, the seller is prompted to tailor the conversation to address the prospect's interests. Among other things, the handheld unit can perform functions such as (i) permitting the seller to retrieve useful information such as inventory availability from a sales information data store; (ii) displaying option-sensitive prompts to aid the seller in discussing specific vehicles under consideration; (iii) accessing remote communications links to external data sources to obtain information on credit-worthiness of the prospect, financing terms, and availability; (iv) displaying motivational information such as the percentage likelihood of consummating the sale successfully; (v) providing a communications link with management personnel.



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- 1 -

PORTABLE SALES PRESENTATION SYSTEM
WITH SELECTIVE SCRIPTED SELLER PROMPTS

1. BACKGROUND OF THE INVENTION

1.1 Cross-Reference to Related Application

5 This application is a continuation in part of co-pending "parent" application Serial No. 08/587,276, filed January 18, 1996, which is incorporated by reference in its entirety.

1.2 Source Code Appendix

10 The microfiche appendix filed herewith contains computer-program source code and database information for an illustrative implementation of the invention. The source code is copyrighted and is the property of the assignee of this application. Authorization is granted to make copies of the source code in conjunction with making facsimiles of this application and any patent(s) issuing thereon, but all other rights are reserved.

15 **1.3 Introduction**

The cost of any goods or services that are sold include costs of marketing. Every item (tangible or intangible) that is sold has included in its costs, the costs of "selling" it. Millions of people are employed in "selling" and hundreds of millions of man-hours are expended in direct face-to-face "selling" every year in the United States. The cost of "selling" is every bit as real a part of the cost of an item or service as is the direct labor cost involved in manufacturing the item or providing the service.

20 It is generally estimated that less than 10 percent of a salesperson's total time is spent actually "selling" — i.e. the direct face-to-face contact with a prospective buyer. Therefore the efficiency of the face-to-face sales process is directly related to the quality with which the face-to-face contact is carried out.

The present invention relates to a computer system that addresses some common information-flow problems in a large "industry," namely the sales process. The computer system organizes specific information to assist salesmen or saleswomen (referred to generically as "sellers") and management in making a presentation to a potential purchaser ("prospect"), in a methodical and consistent manner. Use of the system by a seller produces a number of practical

30

- 2 -

benefits, including a more effective matching of the prospect's needs to one or more specific products or services to the needs of the prospect, as well as faster determination of appropriate financing arrangements. This in turn results in a more satisfactory experience for the prospect and better on-the-job training for an inexperienced seller, both of which lead to more effective utilization of capital by the seller or his or her employer.

In a nutshell, the computer system reduces costs associated with selling, resulting in exactly the same benefits — lower cost and more effective utilization of capital — as systems which reduce costs associated with research, development, design, manufacturing, maintenance, etc.

1.4 Human-Factors Problems in Large-Volume Sales Organizations

The sales process can be usefully thought of as an interaction between a prospect and a seller. When performed correctly, the process comprises a logical series of exchanges of information between the seller and the prospect, between the seller and management, between management and a credit bureau, etc. The actual steps will vary depending upon the type of product and the industry, but the concept of the sales process being a sequence of definable information exchanges remains the same.

Historically, however, the actual process of selling, when done on a large scale, has been a disorganized one. Some people are thought of as "born sellers" and need little training to be effective. With suitable training, many other individuals can learn the sales process and achieve good results. In large sales organizations such as car dealerships, however, turnover is frequently high. As a result, it is often not possible to count on having a population of sellers who all either are born sellers or have had suitable training. That means that variations in natural ability and training lead to what amount to inefficiencies of scale, with a concomitant reduction in productivity.

Such inefficiencies are not inherent to large-scale sales. A significant weakness of selling on a large scale is the inability to enforce a certain measure of standardization of the sales process on large numbers of sellers so that they consistently utilize proven sales techniques.

- 3 -

Sales efficiency (defined here as the ratio between sales consummated to prospective buyers dealt with) improves dramatically when sellers record sufficiently complete data on sales prospects to achieve other goals, such as follow-up communication by phone or mail with those prospects that did not make a purchase, correct determination of closing ratios for each individual seller, or analysis of the advertising source that initially captured the prospect's attention. Inefficient sellers can be given additional training or, if necessary, weeded out when correct determination of sales efficiency ratios for individual sellers can be made accurately, quickly, and with reduced overhead. Advertising efficiency (defined here as the ratio of advertising dollars spent to the gross sales volume produced) is enhanced by analyzing the advertising sources that initially capture prospect attention.

An illustration of the need for such a system can be seen in a car dealership, an area in which very large dollar volume sales occur and the sales process is sometimes poorly administered. In general, dealerships have several characteristics in common:

1. Due to less-than-perfect (or even virtually non-existent) pre-employment screening, dealerships may hire sellers that lack true sales proficiency, a problem in most types of retail sales operations.
2. Due to long hours, Saturday work days, and a poor industry image, car dealerships may suffer from high levels of personnel turnover, particularly in the sales departments (in which 100%+ turnover per year is not uncommon).
3. Due to turnover, dealerships are faced with a constant re-training need, which in some cases is poorly accomplished.
4. Many dealerships hire experienced sellers from other dealerships on the assumption that they are good at what they do and do not require training, when in fact these experienced sellers may use very poor sales techniques.
5. Many dealerships refrain from hiring new, inexperienced sellers because they do not want to make an investment in training or suffer loss of productivity as a new seller comes up to speed.

- 4 -

6. Ironically, dealerships do not want to invest in sales training precisely because turnover is high and the investment would be "wasted" in their view. This tends to produce high failure rates among new sellers.

5 1.5 Prior Attempts at Standardizing the Sales Process

A scattered few vehicle manufacturers (e.g., Lexus, Infiniti, and Saturn) have spent large amounts of time and money attempting to improve the quality and consistency of procedures to control the sales process. Dealerships that exert control over the vehicle sales process have in general been far more successful than those that have not. Many of these dealerships have
10 elaborate pencil and paper control procedures. Some employ computerized systems, but as far as is known they record data only after the fact.

1.6 Long-Felt Need

Despite the modest success of these procedures, direct real-time supervision of the sales
15 process has long been recognized as difficult. To be effective, such supervision must take place where the sales presentations are made, i.e., in changing physical locations throughout the dealership, not at a desk or counter where a supervisor can observe. A sales manager's presence during the conversations between the seller and the prospect, however, is likely to undermine the rapport-building that can be critical to the success of the sales process.

20 The problem is exacerbated by the need for ready communication between the seller and his or her manager, or "control desk." Thus, the need for direct managerial supervision is simultaneously created and made more difficult by the nature of the business. The need is highlighted by the fact that, because considerable advertising dollars are invested in attracting new business to the dealership, each prospect that is handled less than optimally may represent a
25 substantial lost profit opportunity.

2. SUMMARY OF THE INVENTION

A computer system in accordance with the present invention addresses many of these problems, including improvement, standardization, and enforcement of the sales process;

- 5 -

efficient training of new sellers; and real-time control of the process by management. The system comprises one or more handheld computer units used by sellers that may be linked with a central computer unit. Each dealership decides the exact sequence that it would like its sellers to follow. The handheld unit then prompts the seller with a standard script to be followed at each step in the process after a prospect enters the dealership. The prospect's responses to the scripted questions are used to identify the prospect's motivation (e.g., safety) or specific interest (e.g., trailer towing capacity). Software switches can be used to indicate motivations or specific interests. The switches are monitored during the sales presentation. When a motivation or interest is identified, the handheld unit prompts the seller to introduce information corresponding to the identified interest.

3. BRIEF DESCRIPTION OF THE DRAWINGS

Figure 1 is a block diagram of a system in accordance with the invention.

Figure 2 is a perspective view of a specific embodiment of a handheld unit in accordance with the invention.

Figures 3 through 21 are screen prints of illustrative screen displays created on a handheld unit by a specific implementation of software in accordance with the invention. The screen displays, discussed in more detail below, implement the invention for a car dealership.

Figures 22 through 70 are illustrative scripts used in a specific implementation of the invention for a car dealership. The organization of the scripts is discussed below.

4. DETAILED DESCRIPTION OF SPECIFIC EMBODIMENTS

4.1 Overview of Illustrative Embodiment

One illustrative embodiment of the invention takes the form of a system for enforcing recording, by a seller, of information about a vehicle-purchase prospect at an automobile dealership. In the interest of clarity, not all features of an actual implementation are necessarily described in this specification, although many additional details of such an implementation can be found in the microfiche appendix. It will of course be appreciated that in the development of any such actual implementation (as in any computer-system development project), numerous

- 6 -

engineering and programming decisions must be made to achieve the developers' specific goals and subgoals (e.g., compliance with system- and business-related constraints), which will vary from one implementation to another. Moreover, attention will necessarily be paid to proper programming practices for the environment in question. It will be appreciated that such a development effort might be complex and time-consuming, but would nevertheless be a routine undertaking of system development for those of ordinary skill having the benefit of this disclosure.

As shown in Figure 1, at its most basic, the illustrative system comprises one or more seller computer units 110 operated by sellers and may also include a central computer 105. The seller computer unit 110 may be of a size suitable to be held in a seller's hand, referred to simply as a "handheld" unit, although it may be held in the seller's hand, used on a table or on the seller's lap, suspended from a strap around the seller's neck, etc. The illustrative examples discussed below all involve such handheld units. Alternatively, the seller computer unit 110 may comprise a fixed unit, e.g., a desktop computer with suitable programming.

The handheld computer unit 110 manages a sales-information data store, utilizing any convenient database management system (DBMS) software. This sales-information data store may also be located on the central computer. The external data store(s) are remotely located at places such as vehicle manufacturers, credit bureaus, and credit granting institutions on their computer systems 115.

4.2 The Sales-Information Data Store

The sales-information data store, which may be maintained at or by the handheld computer unit 110, or at the central computer 105, or both, includes a number of specific databases. Virtually any of the databases referred to herein can be either local databases on the handheld unit (updated periodically from a central computer or other data store, e.g., via a serial or parallel cable, a network connection, a radio link, or an infrared link) or remote databases located on the central computer, accessed through a conventional disk search or through an on-line query. Some or all of the databases may be combined if desired into a single complex

- 7 -

database, as will be recognized by those of ordinary skill having the benefit of this disclosure. The databases include:

(1) a vehicle-inventory information database, which can include both a dealer's database as well as those vehicles in the inventory of other dealerships in a commonly owned group of dealerships. Inventory information is valuable when the seller cannot locate the particular item sought by the prospect;

(2) a customer database, containing conventional information about customers who have made purchases, enabling the seller to identify a prospect as a valuable repeat customer if one should return to the dealership;

(3) a prospect database, likewise containing similar information about prospects who have visited the dealership. With this information, management can determine if there is a pattern in the point at which sales processes are breaking down, or whether a certain seller suffers from very poor sales efficiency. Very importantly by interrogating this database a prospect can be identified as a returning prospect. A returning prospect, known in the auto industry as a "be-back" prospect, has a percentage likelihood of successful consummation of sale that is easily triple that of a prospect on a first time visit. The reason for this is that a "be-back" prospect has completed his or her shopping process and is now ready to make a purchase. For this reason a "be-back" prospect is especially valuable and deserves special attention. Further, the availability of such information saves the time involved in re-entry of data if the prospect returns to the dealership at a later date;

(4) a pending-transaction database, referred to colloquially herein as a "deal" database. Typically a record is started in the pending-transaction database when the first actual offer is made to or by the prospect. Stored information on pending transactions allows managers to monitor sales transactions as they are taking place, enabling them to insert themselves into the sales process if a deal begins to turn sour; and

(5) control-record information, which can provide, for example: data on financing and leasing plans; data on taxes and fees that would apply to the particular sale; information on other products or services frequently sold in conjunction with the desired purchase item,

- 8 -

information on commission rates that apply to various components of the sale, or the sequence and content of each step in the sales process.

4.3 External Data Stores

Useful information may be contained within databases at one or more external data stores 115 such as manufacturers, credit bureaus, and credit-granting institutions. For example, vehicle manufacturers commonly maintain real-time updated databases of vehicles on order, in production, in transit, and in the inventories of all dealerships nationwide. When a situation is encountered where the dealership does not have on hand the vehicle that the prospect desires, the seller can access this external data store from a handheld computer to see if a suitable unit exists 120 somewhere in the distribution system.

These external data stores may be accessed directly from the handheld unit or through the communications network to the central computer that has a conventional modem attachment to the telephone network to the vehicle manufacturer.

4.4 The Hand-Held Computer Unit

The handheld computer unit 110, referred to as a handheld unit, may be a custom-designed unit or a suitably programmed subnotebook computer or personal digital assistant (PDA). It may be a stand-alone unit; or it may be designed for use as a smart wireless terminal 120 in a larger system including a central computer unit 105; or it may be designed to operate in either stand-alone or smart-terminal mode at the user's option.

A) WIRELESS LINK 120: The handheld unit 110 may have a conventional communications interface or link 120 to the central computer unit 105 or to other handheld unit(s) 110, preferably a wireless link 120 to enable user mobility. The wireless link 120 may take the form of, e.g., a radio modem, an infrared beam, or similar devices.

B) INPUT DEVICE: The handheld unit 110 has a conventional input device operable by the seller for recording data about the prospect, along with suitable conventional programming for managing the input process. The input device may take the form of, e.g., a keyboard; a touchscreen such as those found on many PDAs; a pointing device such as a mouse, trackball, or

- 9 -

J-stick; or a voice-recognition unit. The input device may also have an audio recording input capability.

C) TRANSMISSION OF PROSPECT DATA: The handheld unit 110 may include programming for transmitting prospect data to the central computer unit 105 or to other handheld units 110 via the communications link. The prospect data may be transmitted to the central computer unit 105, but may also be retained locally at the handheld unit 110.

D) SALES INFORMATION REQUESTS: The handheld unit 110 includes programming for interrogating the sales-information data store to obtain information requested by the seller. This may include, e.g., inventory information to determine which cars are in stock or can be obtained quickly.

E) DISPLAY: The handheld unit 110 includes a conventional display (e.g., an LCD display) and suitable programming for displaying requested sales information to the seller. As noted above, display of the requested information may be contingent on the seller having entered all required prospect data and complying with steps in the sales communications process that is required by sales management.

F) LOCAL DATA STORE: The handheld unit 110 may include a local data store (e.g., read-write memory or "RAM," flash memory, or a hard disk drive) for locally storing some or all of the sales information data store. This permits the handheld unit 110 to operate independently of the central computer unit 105 if desired, advantageously reducing wireless communications traffic and permitting use of the handheld unit 110 if the central computer or wireless communications link are inoperable.

G) EXTERNAL DATA STORE: The handheld unit 110 may access databases at external locations such as the external data store 115 via direct communications or by communications over the wireless link 120 to a central computer 105, which has a conventional communications link over telephone lines to the external data store. The communications link may be a modem-type link or a direct digital connection, e.g., an ISDN line, a T1 or T3 line, etc.

- 10 -

4.5 Sales Communication Process

A) SPECIFIED SEQUENCE: The handheld unit 110 includes programming to prompt the seller to perform a specified sequence of steps in a desired sales communication process. The programming may take the form of pre-stored scripts, in a suitable macro-like script language, that are conventionally interpreted by an interpreter (or alternatively are conventionally compiled into executable form) and which, when executed by the handheld unit 110, cause the handheld unit 110 to display appropriate messages on a display.

Different scripts may be used for different sales contexts. For example, a script for an in-person visit by a prospect may prompt the seller to handle the encounter differently than for a telephone inquiry.

The sales communications process(es), and thus the script(s), will normally include obtaining prospect data and recording it in a data store in the handheld unit 110; the scripts preferably take into account the prospect data as it is entered by the seller. For example, if the initial prospect data entered by the seller indicates that the prospect is young, then the programming script may prompt the seller to ask whether the prospect would be interested in a first-time-buyer financing package and to record that prospect data.

B) PRODUCT PRESENTATIONS: The handheld unit 110 may include programming to display a series of scripted product features and benefits. These scripts may vary based upon the particular product that the prospect is interested in. A comprehensive product presentation is key element of a successful sales process.

C) RECORDING OF DATA: For greater usefulness of the system, the seller is asked to record the prospect's personal information such as name, address, etc., early in their meeting. As the seller records the information into the handheld unit 110, the information may be conventionally transmitted (on a real-time basis or periodically in a batch) to other handheld units 110 or to the central computer unit 105 for storage in the appropriate database for use in a conventional sales prospect follow-up system. Thus, no matter how the sales transaction ends, the dealership will always have a record of the prospect's visit and can follow-up the visit with a letter or phone call.

- 11 -

Human factors are a disincentive to comply with recording of prospect data: Since sellers are evaluated on their sales efficiency, they have a disincentive to record data on prospects that do not purchase since this would reflect negatively on their sales efficiency ratios. Historically for this reason sellers in this situation have done a very poor job of collecting prospect data in spite of its obvious usefulness to the dealership.

D) INCENTIVES TO COMPLY WITH SALES PROCESS: Notably, the sales-information-request programming of the handheld unit 110 includes one or more program routines to deny access by the seller to the sales-information data store and to the remote communications links to the external data sources, and to display an appropriate reminder message, if the seller has not complied with the specified steps in the sales process. This gives the seller a large incentive both to comply with the process and to record data as required by the process. For example, the program routines may prevent the handheld unit 110 from accessing the vehicle-inventory information database if all required prospect data has not been entered. Alternatively, the routines may permit the handheld unit 110 to obtain the requested data from the sales information data store, but then not permit the data to be displayed until all required prospect data has been entered. As with many of the program routines described for the handheld unit 110, these program routines may equivalently be located in and control the central computer unit 105 to prevent that unit from transmitting requested data to the handheld unit 110.

E) TIME STAMPS: The illustrative handheld unit 110 includes suitable conventional programming for recording time stamps to identify the time and/or duration of performance of respective steps in the desired sale communication process. The time stamp records are used to record the actual time (either clock time or elapsed time during the sales encounter) at which the seller records specified information. This permits sales management to confirm with reasonable confidence that the seller is in fact performing the appropriate steps in the sales communication process instead of, e.g., recording fabricated or "bogus" data all at once. For example, if the manager sees that a certain seller's tour of the dealership facilities with a prospect lasted only 15 seconds, the manager knows the seller has circumvented that step in the process and can counsel him or her. The time stamps can both be recorded locally at the handheld unit 110 or uploaded to the central computer unit 105 via the communications link for statistical analysis of seller

- 12 -

performance. Alternatively, the time stamp records can be created at the central computer unit 105 as prospect data and other data are transmitted by the handheld unit 110.

F) EXTERNAL CHECKS ON PROCESS COMPLETION: Suitable programming can be included in the handheld unit 110, the central computer unit 105, or both, for receiving and processing a signal from an external device indicating that a specified step in the sales communication process has been completed. The external device may be, e.g., a sensor in an vehicle key storage machine that signals when a particular seller, identified by a password or an electronic keycard (similar to a bank automated teller machine card), checks out the keys to a car for a test drive. Other external devices may be advantageously utilized to verify the physical location of the seller at a particular time, thus serving as an additional check on the seller's compliance with the specified sales communication process.

Similarly, programming can be included for sending a signal to a gate controller to open a vehicle access gate. The seller, when driving out of the dealership parking lot for a test drive, thus can use the handheld unit 110 to send a signal to the gate controller, either directly or via the central computer unit 105. The handheld computer 110 logs the fact that the seller is leaving the premises on a test drive with the prospect in question. Again, this verification of the seller's physical location at a particular time serves as a check on the seller's compliance with the sales process.

G) SELECTIVE AUDIO RECORDING: Conventional hardware and suitable programming may be included in the handheld unit 110 for selective audio recording of a conversation between the seller and the prospect. Selective audio recording of the actual conversation between the seller and the prospect can be useful. For example, Saleswoman A may be known to perform well in obtaining initial prospect wants and needs. Audio recording of this portion of her conversation with the prospect may be deemed unnecessary and thus can be skipped. On the other hand, Salesman B may be weak in this area; when he indicates on the handheld unit 110 that he is in this phase of the desired sales communication process, the handheld unit 110 may automatically commence audio recording until the next phase of the conversation. Sales management is then able to selectively listen to the actual sales process as it progressed and counsel the seller on sales techniques. If required by privacy laws, the handheld unit 110 may be

- 13 -

programmed to play an audible message on commencement of recording, such as "to help ensure quality service, this conversation may be monitored or recorded."

H) FINANCING ASPECTS: The handheld unit 110 may include programming for transmitting identifying information about the prospect and a creditworthiness inquiry to a financial institution computer 125, and for receiving and processing a creditworthiness report from that computer. If the handheld unit 110 includes an input device that can store a signature digitally, then the prospect can be asked to "sign" an authorization granting the dealership permission to access the user's credit history. The input device may be a conventional pen- and touch-screen interface of the kind found in some PDAs; a similar device of the kind found at some cash registers for credit card authorizations; or the like. Access to the financial institution computer 125 may be via direct link or may be through a conventional data link such as a modem controlled by the central computer unit 105. The financial institution may be a credit bureau or an actual financing source. In the latter case, the financing source may perform its own credit check and make a preliminary creditworthiness determination to be transmitted back to the seller. This in turn helps the seller qualify the prospect, i.e., to determine the price range of the vehicle for which the prospect is likely to be able to obtain financing.

I) COMPUTATION OF FINANCE TERMS: The handheld unit 110 may include conventional programming enabling the seller to use it as a financial calculator for calculating, e.g., lease payments, loan payments, and the like. As the sales process progresses, the prospect data, creditworthiness report, and finance terms may be transferred to another handheld unit 110 or a central computer system 105 for finalization of paperwork or for negotiation purposes as described below.

J) REAL-TIME NEGOTIATION: The handheld unit 110 programming may include routines to permit the seller to send offers to and counteroffers to other handheld computers 110 or the central computer unit 105. A sales manager or similar person may read and respond to these exchanges, e.g., using another handheld unit 110 or a terminal 130 attached to the central computer 105. By eliminating most of the seller's trips back and forth from the prospect to the sales manager's desk, much of the time needed to consummate a sale is reduced. This reduction of time spent in the negotiating process is a vital element in improving sales efficiency since if

- 14 -

this process becomes extended, the prospect is increasingly likely to have misgivings and decline to consummate the sale. The capacity for real-time negotiation becomes increasingly valuable in situations of high activity (like a Saturday), when there are a large number of sellers per sales manager, when the average experience level of sellers is low, when there is a large number of sellers working at a single location, or when the physical distances at a given location between sellers and sales management are large.

K) REAL-TIME SALES PROGRESS DISPLAY: The programming of the handheld unit 110 may include routines for real-time computation and display of sales progress information applicable to the transaction. For example, the likelihood of closing the sale may be estimated and displayed on the handheld unit 110 by comparing factors such as (a) the length of time that the prospect has consented to spend with the seller during each step of the sales process, and/or (b) the number of steps in the process that have been completed, with historical data on previous sales process outcomes (e.g., stored in the sales information data store) for that dealership, that city, etc. This likelihood may be displayed in a variety of ways (e.g., a percentage number, a gas-gauge indicator, etc.) to show the likelihood of closing the sale going up as each step is completed. This encourages the seller to perform each step thoroughly, taking sufficient time to communicate the desired information to the prospect.

L) REAL-TIME SALES COMMISSION DISPLAY: The programming of the handheld unit 110 may include routines for real-time computation and display of the commission that would be paid to the seller if the sale were to be consummated on the specified terms. This can serve as a powerful sales motivator for the seller.

M) COMPARATIVE RANKING AMONG SELLERS: The handheld unit 110 may also be programmed to display a list of sellers at the dealership, ranked by performance for a given period, e.g., by sales achieved in a given month. This constantly updated real-time display of sales rankings also can serve as a sales motivator for sellers.

N) DETERMINATION OF PARTICULAR PROSPECT INTERESTS: The programming and data structures of the handheld unit 110 may also be designed such that answers to scripted questions provide an indication of the prospect's general interests (sometimes referred to here as "motivations") or specific interests (sometimes referred to here as "hot buttons"). For example,

- 15 -

the prospect's responses to questions may indicate that the prospect is generally interested in safety. Other typical prospect motivations include performance, economy, and style, to name but a few examples. Moreover, the prospect may be specifically interested in features of a car such as air bags, trailer towing packages, etc. Some or all of these various interests may have different
5 degrees of importance to different prospects.

If a prospect's answers to questions (alone or in combination) indicate the presence of one or more general interests or specific interests, that fact(s) is noted by setting one or more flags within an appropriate data structure, either within the handheld unit 110 or within the central computer unit 105. The handheld unit 110 then prompts the seller to ask specific additional
10 scripted questions or make specific additional comments related to that interest to help focus the discussion. The handheld unit 110 thus helps the seller do what an expert seller likely would do intuitively.

This can be implemented in a variety of ways. For example, the programming of the handheld unit 110 may be designed so that the required flags are maintained in a suitable data
15 structure in memory within the handheld unit. The term "flag" is used here to include values of specific data variables. For example, if a prospect's responses indicate that she has two children, ages 4 and 2, the fact that she has children and their respective ages may be recorded in appropriate variables and used as flags concerning safety as a motivation and for fold-down child seats as a possible hot button. Then again, if the prospect's answers indicate that she
20 affirmatively does not plan to use the car to carry her children (e.g., she is buying the car for her college-bound oldest child), the fact that she has younger children may be overridden.

The overall logic of the programming in this regard is quite simple: At one or more appropriate points in the encounter between the seller and the prospect, if a flag is set indicating that the prospect has a particular motivation (as determined, e.g., by the prospect's responses to
25 particular questions), then the seller is prompted to provide information or ask questions relevant to that motivation. For example, if a flag is set indicating that safety is a motivation for the prospect, then at one point in the encounter the seller is prompted to mention the fact that the vehicle has side air bags; at another point the seller is prompted to mention the vehicle's built-in, fold-down child seats; and so on.

- 16 -

Motivation switches and hot buttons of this kind can also be implemented in whole or in part in the central computer unit 105. For example, the central computer unit may determine from the prospect's ZIP code that the prospect lives in an area in which mini-vans are popular. In response, it may prompt the seller, via the handheld unit 110, to suggest to the prospect that
5 "you know, a lot of people in your neighborhood are buying this model of mini-van."

As would be apparent to one skilled in the art, conventional programming methods can be used to determine a prospect's motivations and hot buttons. Thus, the actual implementation of the required programming is immaterial here.

O) SELECTIVE PRESENTATION OF PRODUCT OPTIONS: Many products sold to the public
10 include various options. For example, cars, trucks, and similar vehicles often come with options such as air conditioning, a trailer-towing package, built-in child seats, etc. A seller will frequently make a sales presentation about a specific example of a product, e.g., a specific car or truck on the lot. It may be desirable for the seller to talk only about options actually installed on that specific car or truck. An experienced seller is likely to know this. A novice seller, on the
15 other hand, may not be aware which options are installed on the particular car or truck (or may not even be aware of the extent of the available options).

The programming and data structures of the handheld unit 110 therefore may be designed to be sensitive to the actual options installed on a particular vehicle. The vehicle identification may be obtained and inputted into the handheld unit 110 in any convenient manner, e.g., by
20 selecting from a menu of available vehicles having specified characteristics or by direct entry of the factory-applied vehicle identification number (VIN). Information about the options installed on that particular vehicle may be stored in the sales-information data store as described above.

The programming for the sales communication process can then easily be designed to prompt the seller to talk at a suitable point about the specific options already installed on the
25 vehicle, e.g., in response to the motivation switches and hot buttons described above. The script for the sales communication process can include suitable remarks for the seller to make, e.g., "this particular car has the new high-performance engine already installed." Additional information about the option can be displayed if desired, either automatically or in response to a command inputted by the seller.

- 17 -

The programming and data structures of the handheld unit 110 can also be designed to provide the seller with a list of options that could be installed on that vehicle if desired. In that way, if the prospect indicates interest in other options, the seller can respond with an appropriate list.

5 If the prospect indicates interest in an option not already installed on that vehicle, the handheld unit 110 may identify from the sales-information data store a vehicle that does already contain that option and display that information to the seller.

If the prospect is trying to decide which specific vehicle he or she prefers, the handheld unit 110 may display a compare-and-contrast list of options for each vehicle, e.g., in table form.

10 It will be appreciated by those of ordinary skill having the benefit of this disclosure that programming of these option-sensitive features is conventional. A simple implementation entails providing, in the sales-information data store, a data structure with option information about each specific vehicle on the lot. Depending on the implementation, the data structure may include a flag indicating the presence of an option and/or more detailed information about the option. The portion of the programming that causes display of a script on the handheld unit 110 simply checks the data structure to determine whether a particular option is present and modifies the script accordingly (possibly depending on other factors such as whether the prospect has expressed any interest in the option).

20 P) INCORPORATING PROSPECT INFORMATION INTO CUSTOMIZED SCRIPTS: The data collected about the prospect during the sales presentation can be used to customize the script displayed to the seller through simple parameter substitution. The customized script can reflect information such as the prospect's name, spouse's name, children's names, current vehicle owned, mileage on current vehicle, etc. This may help the inexperienced seller build a rapport with the prospect in the same way that experienced sellers do. The customization can be readily implemented in conventional fashion in the programming of the handheld unit 110, the central computer unit 105, or both, as convenient.

25 The simplest example of such customization is probably the parameterized substitution of the client's name into the script. Some sellers believe that use of the prospect's name is a key factor in building a rapport with the prospect. Suppose that the seller has input data into the

- 18 -

handheld unit 110 (or retrieved it from the sales-information data store) indicating that the prospect is female, she is a physician, and her last name is Jones. At an appropriate point the script might include a reminder to work the prospect's name into the conversation. The unsubstituted script might read "<Title> <Last_Name>, if you have time, let's take a test drive."

5 As displayed to the seller on the handheld unit 110, it would read "Dr. Jones, if you have time, let's take a test drive."

As a more sophisticated example, suppose that the prospect, Dr. Jones, has said that she has a one-year old son John and that she is interested in a particular model of mini-van because it has built-in child seats. If the script is option-sensitive as described above, at an appropriate point it can suggest that the seller make a comment such as "You see the child seats back here -- they're designed for children three months to five years old, so <Child_Name> should be able to use it till he's big enough to go without one." As displayed to the seller on the handheld unit 110, the script reads ". . . so John should be able to use it till he's big enough to go without one."

15 Q) "RECAPPING" SCRIPT SEGMENT: One skill of an experienced seller is the ability to remember those features of a product that aroused the prospect's interest during the sales communication process and to recap them orally during the closing stages of the process. To the extent that the seller provided data to the handheld unit 110 indicating the prospect's interest in specific options (or if the data was already present in a sales-information data store), then upon a suitable command from the seller (possibly in response to a reminder prompt from the handheld unit 110), a recap list of those options is displayed on the handheld unit 110. Alternatively, the handheld unit 110 can display the recap list automatically when the information available suggests that the sales communication process has entered a specified phase.

25 R) "MANAGER HELP" BUTTON: For any given prospect, an inexperienced seller is likely to encounter difficulties at some point. The seller might not be saying the right things at the right time. There might be a personality conflict, mild or severe. There are undoubtedly dozens of reasons why any given sales communication process might go badly for an inexperienced seller.

- 19 -

Consequently, inexperienced sellers are trained to go get their managers if they sense that they are losing control of the sales communications process with a given prospect.

Unfortunately, this often entails a seller asking the prospect to wait while the seller finds the manager. As often as not, the prospect seizes the opportunity to depart gracefully — resulting in a lost sales opportunity. This can cause inexperienced sellers to be reluctant to leave the prospect to go get the manager. In those cases where an experienced sales manager can be discretely brought into the sales communication process, however, there is a reasonable chance that the situation can be turned around and the prospect converted into a buyer.

To address this situation, the handheld unit 110 may include a "Manager Help" button. The Manager Help button is very similar in concept to the "panic button" found on handheld units available for some home-security systems — a householder can keep the handheld unit on or near his or her person; pressing the panic button transmits a signal to the security service, which sends someone to investigate.

The Manager Help button may be conventionally implemented in hardware or, preferably, in software as an icon or menu choice on the display of the handheld unit 110. When the seller "hits the button" (literally or figuratively), the handheld unit 110 signals the central computer unit 105 that a manager's assistance is required. The central computer unit 105 then generates an appropriate message on, e.g., a terminal in the sales manager's office. The message may include information such as the seller's identity and a summary of what has transpired in the sales communication process with that prospect. The sales manager can then "stop by" and very naturally introduce him- or herself into the sales process.

The Manager Help button can be implemented so that pressing the button brings up a menu or a series of icons indicating different kinds of available assistance. The available assistance might include items such as "Soft drinks" (resulting in someone coming to take the prospect's drink order), "Service department," (resulting in a service-department representative coming to join the conversation), and the like. One or more of these items can be in addition to, or in lieu of, the manager assistance described above.

S) CACHING OF SCRIPTS, ETC.: If a suitably fast wireless link is available between the handheld unit 110 and the central computer unit 105, then the handheld unit can be programmed

- 20 -

to interact with the central computer unit on a real-time basis while in use and while in range of the central computer unit. Thus, when a seller is using the handheld unit 110 in range of the central computer unit, it effectively acts as a wireless terminal for the latter unit.

In that way, the seller uses the most current version of the scripts, sales information, etc. (referred to here as the "information load" of the handheld unit), as is practicable. That means, for example, that the seller will have up-to-date information about the vehicle inventory; he or she will not attempt to sell a prospect a vehicle that has already been sold, nor attempt to show a vehicle that is already being test-driven by another prospect (assuming that such information is kept current in the central computer unit 105).

But the handheld unit 110 is designed to be used in a mobile environment. There likely will be times when the handheld unit is out of range of the central computer unit 105, e.g., if the seller is on a test drive with a prospect.

To address that problem, the information load may be periodically downloaded from the central computer unit 105 into storage (preferably nonvolatile storage such as a hard disk drive or nonvolatile RAM) on the handheld unit 110. That makes the information load available for use by the seller even if the handheld unit loses contact with the central computer unit. In concept, such downloading is much like the "caching" of Web pages, graphics, etc., by browsers such as Microsoft's Internet Explorer and Netscape's Navigator, so that the Web pages and graphics can be viewed even if the user does not have a current connection to the Internet.

The downloading operation is preferably performed automatically upon startup of the handheld unit 110, e.g., through the use of an AUTOEXEC.BAT file or a Windows 95 Startup program. Such downloading, when successful, ensures that the handheld unit gets a current information load.

T) DATA COMPRESSION: If desired, the downloading may use data-compression and -decompression techniques to speed up the data transmission. That is, the central computer unit 105 may use any of a variety of conventional data-compression algorithms to substitute short strings of characters in place of long strings. For example, in the so-called dictionary approach, the central computer unit 105 would transmit comparatively short codes in place of longer strings of data characters; the handheld unit 110, using a compatible dictionary, would translate

- 21 -

the codes back into the original longer strings of data characters. (The programming of the handheld unit 110 can be designed to store the data in compressed form and decompress on an as-needed basis instead of decompressing it immediately upon receipt.) Well-known examples of dictionary-based data compression include those pioneered by Lev and Zempel as well as several variations on the basic LZ approach such as Lev-Zempel-Welch (LZW); in these examples, dictionaries are built up "on the fly" to match the actual data transmitted.

U) REFRESH-TYPE UPDATING: If the information load is downloaded into nonvolatile storage in the handheld unit 110, the downloading operation can be conventionally designed to function in the well-known "refresh" mode. That is, the central computer unit 105 determines which portions of the desired current information load are already present in the handheld unit 110 and downloads only those portions that are not already present. The refresh operation may be performed in any convenient manner. One simple approach is for the central computer unit 105 to send a signal to the handheld unit 110 directing the handheld unit to provide a directory listing of the separate data files making up its information load, including the dates and times of each file. That information can be used by the central computer unit to determine which files should be updated. Alternatively, conventional record-level marking or tagging can be used to determine which if any record(s) in a database of scripts, sales information, etc., are candidates for updating.

V) PERIODIC UPDATING OF DATA: After initialization of the information load, selected portions thereof may be updated from time to time to reflect ongoing changes in the sales information data store. For example, a car dealership may refresh its handheld units 110 by downloading updated data whenever a specific vehicle is sold, so that other sellers will no longer attempt to test-drive that vehicle; or whenever new vehicles are added to the inventory. The update operation may be performed on a periodic basis, e.g., once per hour, once every four hours, etc. It may also be performed on an as-needed basis, e.g., when an inventory item (such as a specific vehicle) is sold or is added to the inventory. The update operation could be performed in some combination of periodic and as-needed basis. The update operation may be initiated by each handheld unit 110 or by the central computer unit 105.

- 22 -

4.6 Description of Specific Illustrative Embodiment

HARDWARE: One possible embodiment of the handheld unit 110 is the Fujitsu Stylistic 1000 RF, shown in Figure 2 identified by the reference numeral 200 / 110, running the Microsoft Windows 95 operating system. In implementations involving outdoor sales work (e.g., car dealerships), the available transfective monochrome liquid-crystal display (LCD) option is preferred for the screen 205 for greater visibility in sunlight. This model of the Stylistic 1000 includes an antenna 210 for a spread-spectrum radio; if a different model without a built-in wireless link is used, then a separate unit such as an ARLAN wireless LAN adapter can be inserted into the PCMCIA slot (sometimes called the PC Card slot) on the handheld unit. Data entry can be accomplished with a stylus 215. The unit advantageously includes a hot-swappable battery, permitting the battery to be changed without powering down the unit. At this writing, more detailed information is available at

<http://www.fpsi.fujitsu.com/products/st10RF.htm>.

A) SOFTWARE - SCREEN DISPLAYS, DATA ENTRY: Figures 3 through 21 show examples of screen displays and data entry fields. The examples are from an experimental prototype of the invention designed for use in car dealerships. The Figures show fictitious prospect data in the displays. It will be appreciated by those of ordinary skill having the benefit of this disclosure that other screen arrangements are possible and, in other contexts, may be preferable to the ones shown here; for example, an implementation of the invention for use in a jewelry store obviously will be different from the car-dealership illustration shown in the drawings. Which specific screen arrangement to use in a given context is a matter of design choice for the artisan.

As seen in Figures 3 through 20, the prototype display- and data-entry screens for a given prospect are conventionally organized by representations of notebook tabs shown at the bottom of each screen. A given screen can be brought up on the display 205 of the handheld unit 110 by clicking with the stylus 215 on the appropriate tab. As is customary for such a display organization, the tab for screens not actually being viewed may be shown in a different color or shading than the tab for the screen being viewed. The specific prototype display / data entry screens shown in the Figures are described in Table 1 below; three-letter codes correspond to the codes at the lower right portion of various (but not all) screens.

TABLE 1: DESCRIPTION OF SELECTED FIGURES

| | | | |
|-----------|-----|---|---|
| Figure 3 | INF | Prospect info | Basic information about the prospect, e.g., name, address, phone number |
| Figure 4 | PER | Prospect personal data | More detailed information about the prospect such as Internet address, nickname, hobbies |
| Figure 5 | COB | Co-buyer data | Information about a co-buyer such as a husband or wife |
| Figure 6 | WAN | Prospect wants | Details about what the prospect wants in a vehicle |
| Figure 7 | TRA | Trade-in | Information about the car the prospect wants to trade in |
| Figure 8 | APP | Trade-in appraisal | Trade-in appraisal information |
| Figure 9 | SEL | Vehicle search (Attributes and Price / Payment tab) | A form for searching the sales data store to locate vehicles matching specific criteria |
| Figure 10 | SEL | Vehicle search (Options tab) | A form for searching the sales information data store to locate vehicles matching specific criteria |
| Figure 11 | | Vehicles found | A list of vehicles found in the sales information data store that match the search criteria, along with detailed information about a highlighted vehicle |
| Figure 12 | VEH | Selected vehicle | Information about a specific vehicle; includes a "Hold for salesman" button in the lower right corner to place a temporary hold on the vehicle |
| Figure 13 | CBI | Credit bureau inquiry | Displays information to be sent to a credit bureau. Includes a "Send" button in the lower right corner, which causes a credit inquiry signal to be transmitted. |
| Figure 14 | OFF | Prospect offer | A screen showing the current status of offers and counteroffers. |
| Figure 15 | SOL | Sold | Information about a specific vehicle sold to a specific prospect |
| Figure 16 | DEL | Delivered | Information about a specific vehicle delivered to a specific prospect |

- 24 -

TABLE 1: DESCRIPTION OF SELECTED FIGURES

| | | |
|-----------|---------------------------|--|
| Figure 17 | Select a vehicle position | A graphical touch-screen prompt that brings up script prompts with suggested points for the seller to discuss about the area of the car touched (see Figures 18, 19). If the sales information data store contains enough specific information about the various makes and models of vehicles, additional touch-screen prompts can be "nested," e.g., touching the "Interior" region brings up a list (or diagram) of interior features such as air conditioning, cruise control, etc. |
| Figure 18 | Speed Control | A sample script prompt; includes three navigation buttons Next, Previous, More. |
| Figure 19 | Speed Control | Another sample script prompt. |
| Figure 20 | BEB Sales Manager | A screen brought up when the seller wants to close out the prospect record. Data fields marked by an asterisk are the minimum data that the seller should collect and record to be able to return to the main menu. The "beback" date and time fields indicate when the prospect has indicated s/he will return. |
| Figure 21 | | An example of a dialog box with a suggested script and three buttons for the seller to choose from. Includes two navigation buttons, Top and Previous, at the top right of the dialog box. |

B) SOFTWARE - SCRIPT BUTTONS: Many of the screens have two rows of "buttons" at the top of the screen (with some buttons grayed out in some of the screens). Clicking on a button in the second row causes the handheld unit 200 / 110 to begin running a script for the

5 corresponding phase or "step" of the sales presentation process as described in Table 2. An asterisk may be displayed in one of these step-related buttons to indicate that the seller has worked through enough of the script for the step in question that the step can be marked as complete. For example, in Figure 3, the GRT button has an asterisk to show that the Greeting

10 step has been sufficiently completed.

The script (reproduced in Figures 22 through 70) prompts the user to say certain things to the prospect and to enter certain data at specific points in the sales presentation process; the data

- 25 -

entered are displayed on the screens described above. Many but not all of the three-letter codes for the scripts are the same as the three-letter codes for the screens listed in Table 1.

TABLE 2: SCRIPTS IN PROTOTYPE SELLER PROCESS

| | |
|-----|--|
| GRT | Greeting the prospect |
| WAN | Determining the prospect's wants |
| SEL | Selecting an actual vehicle |
| PRO | Product presentation (a detailed product-presentation script with prompts for discussion of features found in specific vehicles is in the file SCRIPT.RPT in the microfiche appendix). |
| DEM | Demo of a vehicle |
| TRA | Trade-in |
| SER | Service department (often user-defined to be specific to the dealership) |
| WRI | Write up the order (offers and counter-offers) |
| SOL | Update the information on the vehicle sold |
| DLR | Dealer-defined, e.g., "why should you buy your car here" information |

The script, shown in Figures 22 through 70, can be thought of as a flowchart expressed in words. Each "line" of the script, referred to as a record, contains information as described in Table 3 below. Execution of the script by the handheld unit 200 / 110 causes a dialog box (see, e.g., the "Welcome to ABC Motors. How may I assist you today" dialog box shown in Figure 21) to be displayed "over" the screen that is currently being displayed (e.g., the Prospect Info screen shown in Figure 3).

TABLE 3: SCRIPT CONTENTS

| | |
|-------------|--|
| SCRIPT TEXT | Text to be displayed in the dialog box to prompt the seller to say specific things to the prospect. For example, in Figure 27, at the script record labeled DEM 0100, the seller is prompted to say "Let me start the car, and I'll show you more about the interior of this vehicle." |
| ANSWER | The text of zero or more buttons, menu choices, etc., to be displayed as part of the dialog box so that, e.g., the seller can indicate the prospect's response to the SCRIPT TEXT. For example, in Figure 27, three potential answers are displayed: OK, No time, and Not buying. |

TABLE 3: SCRIPT CONTENTS

| | |
|-----------------|---|
| GOTO | Indicates that, when this script record is executed, a different screen is to be displayed "under" the dialog box. For example, in Figure 36, script record SEL 0020 contains the entry SEL in the GOTO field. This indicates that when this record is executed by the handheld unit 200 / 110, the "Vehicle search" screen shown in Figure 9 (whose three-letter code is SEL) is displayed under the dialog box. |
| PUT DATA, FIELD | Specific data values to be entered in specific fields in the sales-information data store. For example, in Figure 38, if the seller clicks on the answer indicating that the prospect's trade-in is being financed by FMCC, then the value "FMCC" is assigned ("put") to the field TRADELIENNAM (trade-in lienholder name). |
| STEP, SEQ | The next record of the script to be executed (which can vary depending on which prospect response is selected). For example, in Figure 27, if the prospect's answer to "Let me start the car ..." is "OK," then the handheld unit 200 / 110 executes script record DEM 0140, which suggests that the seller "[t]ake the time to explain or review one or more of the interior features covered in the product presentation." |
| * (asterisk) | Indicates that, when the script record in question is completed, the entire "step" can be marked as complete. For example, in Figure 36, the "Y" entries in script records SEL 0020, 0030, and 0040 indicate that if any of these three records is executed, the entire Vehicle search step in the sales presentation process, whose three-letter code is SEL, can be marked as complete (see, e.g., the asterisk in the SEL button shown at the top of Figure 12). |

C) SOFTWARE - OTHER BUTTONS: Referring to Figure 3 as an example, the top row of buttons includes the buttons Show Script; Close Prosp[ect], and Manager. The Show Script button causes the handheld unit 110 to resume running a script that was suspended by the seller (using a Hide Script button, not shown). The Close Prosp[ect] button signifies that the sales presentation has ended, either with or without a sale. The Manager button causes a signal to sent to summon a sales manager as described in Section 4.5(r) above.

D) SOURCE CODE: It will be appreciated by those of ordinary skill having the benefit of this disclosure that much more detail about the operation of the prototype can be found in the source code reproduced in the microfiche source code appendix. The code is written to be compiled with the Microsoft® Visual C++ compiler.

- 27 -

4.7 Other Remarks

Use of the system described above helps management enforce the desired standardization of the sales process. The seller cannot advance through the prescribed sales process until he or she has completed all prior steps. In this way, management is assured that each prospect
5 receives the treatment that has been deemed most effective in making a sale.

For example, the handheld unit 110 ordinarily allows the seller to retrieve and view sales information from the sales information data store for the benefit of the prospect (e.g., to determine whether a particular model is in stock). However, if the seller has not recorded the prospect's personal information such as name, address, and telephone number, the system will
10 not allow the seller to retrieve that information. Thus, unless the seller follows the prescribed program, he or she is effectively prevented from proceeding. However, if the seller progresses through the prescribed steps, the handheld unit 110 may inform the sales management of each step completed successfully. In this way, management keeps abreast of which transactions have been dragging in critical stages, when management assistance might be useful.

15 The system provides other benefits besides adherence to the sales process. New sellers are easily trained on the job: once they learn to use the sales machine, it gives them a step-by-step script to follow, taking the guesswork out of the learning process.

Sellers are prompted through a thorough product presentation of features and benefits. These product presentations are specific to the product that the prospect desired to purchase and
20 are tailored to address both the general and specific interests of the prospect.

Also, management now has an accurate picture of each seller's sales efficiency (ratio between number of sales completed per number of prospects seen). In a paper based system, sellers had a disincentive to record the visits of prospects who made no purchase, so management did not get any real idea of how well each seller was performing.

25

4.7 Program Storage Device

As noted above, any of the foregoing variations may be implemented by programming a suitable general-purpose computer having appropriate hardware such as a microprocessor, memory, and a communications device such as a modem (preferably wireless for the handheld

- 28 -

device 110). The programming may be accomplished through the use of a program storage device readable by the computer and encoding a program of instructions executable by the computer for performing the operations described above. The program storage device may take the form of, e.g., one or more floppy disks; a CD ROM or other optical disk; a magnetic tape; a read-only memory chip (ROM); and other forms of the kind well-known in the art or subsequently developed. The program of instructions may be "object code," i.e., in binary form that is executable more-or-less directly by the computer; in "source code" that requires compilation or interpretation before execution; or in some intermediate form such as partially compiled code. The precise forms of the program storage device and of the encoding of instructions are immaterial here.

* * *

It will be apparent to those of ordinary skill having the benefit of this disclosure that numerous variations are possible from the illustrative embodiments described above. Accordingly, it is the claims below and not the illustrative embodiments that measure the exclusive rights claimed in the invention.

- 29 -

WHAT IS CLAIMED IS:

1. A sales support computer comprising:

- a) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect; and
- b) means for prompting the seller to perform a specified sequence of steps in a desired sales communication process during a meeting with the prospect in response to the at least one particular interest of the prospect.

2. The sales support computer of claim 1 wherein the sales support computer is of a size suitable for the computer to be held in the seller's hand.

3. The sales support computer of claim 1 wherein the particular interest is selected from the group consisting of safety, economy, performance, style, trailing towing capacity, side airbags, and anti-lock braking.

4. The sales support computer of claim 1 wherein the information about at least one particular interest of the prospect includes information about the composition of the prospect's family.

5. The sales support computer of claim 1, wherein the prompting to perform specified sequence of steps includes prompting the seller to say specific prospect-related information aloud.

6. The sales support computer of claim 5, wherein the specific prospect-related information comprises the prospect's name.

7. The sales support computer of claim 5, wherein the specific prospect-related information comprises information about a product option in which the prospect has indicated an interest.

- 30 -

8. The sales support computer of claim 5, wherein the specific prospect-related information comprises a recap list of information about product options in which the prospect has indicated an interest.

5 9. The sales support computer of claim 1, further comprising:

c) means for prompting the seller with a script of product features and benefits.

10. The sales support computer of claim 1, further comprising:

c) means for displaying a list of options available for a specific product.

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11. The sales support computer of claim 1, further comprising:

c) means for simultaneously displaying information about the availability of one or more specified options for two or more specific products.

15 12. The sales support computer of claim 1, further comprising:

c) means for displaying a table of option availability for two or more specific products.

13. The sales support computer of claim 1, further comprising:

20 c) means for summoning assistance for the seller.

14. The sales support computer of claim 1, further comprising:

c) means for retrieving information from an external data store.

25 15. The sales support computer of claim 14, wherein the retrieved information comprises consumer credit information.

16. The sales support computer of claim 1, further comprising:

- 31 -

- c) means for retrieving and displaying sales information from a sales information data store; and
- d) means for preventing the seller from perceiving sales information from the sales information data store unless the seller records the prospect data.

5

17. The sales support computer of claim 1, further comprising:

- c) means for retrieving and displaying sales information from a sales information data store; and
- d) means for preventing the seller from perceiving sales information from the sales information data store if the seller does not comply with the desired sales communication process.

10

18. The sales support computer of claim 1, further comprising:

- c) means for accessing an external data store, and
- d) means for preventing the seller from retrieving information from the external data store if the seller does not comply with the desired sales communication process.

15

19. The sales support computer of claim 1, further comprising:

- c) means for recording the duration of performance of respective steps in the desired sale communication process.

20

20. The sales support computer of claim 19, wherein the means for recording the duration of performance of respective steps in the desired sales communication process comprises means for recording time stamps identifying the respective times of performance of the steps.

25

21. The sales support computer of claim 1, further comprising:

- c) means for transmitting a creditworthiness inquiry about the prospect to a financial institution, and

- 32 -

d) means for receiving a creditworthiness report on the prospect.

22. The sales support computer of claim 21, further comprising:

e) means for recording a representation of the prospect's signature, and

f) transmitting a representation of the prospect's signature to the financial institution.

23. The sales support computer of claim 1, further comprising:

c) means for transmitting a sales offer and means for receiving a response to the offer.

24. The sales support computer of claim 1, further comprising:

c) means for locally storing at least a portion of a sales information data store; and

d) means for periodically updating said locally-stored portion.

25. A sales support computer comprising:

a) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;

b) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including (1) recording prospect data, and (2) telling the prospect about a product option correlated with the prospect's particular interest; and

c) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations.

26. The sales support computer of claim 25, wherein the particular interest is selected from the group consisting of safety, economy, performance, style, trailing towing capacity, side airbags, and anti-lock braking.

- 33 -

27. The sales support computer of claim 25, wherein the information about at least one particular interest of the prospect includes information about the composition of the prospect's family.

5 28. A sales support computer comprising:

- a) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;
- b) means for querying a sales information data store to determine the availability of specific products having one or more features correlated with the prospect's particular interest;
- 10 c) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including:
 - (1) recording prospect data, and
 - 15 (2) telling the prospect about one or more features that are correlated with the prospect's particular interest; and
- d) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations.

20 29. The sales support computer of claim 28, wherein the particular interest is selected from the group consisting of safety, economy, performance, style, trailing towing capacity, side airbags, and anti-lock braking.

30. The sales support computer of claim 28, wherein the information about at least one particular interest of the prospect includes information about the composition of the prospect's family.

25

- 34 -

31. A sales support computer comprising:

- a) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;
- b) means for querying a sales information data store to determine the availability of specific products having one or more features correlated with the prospect's particular interest;
- c) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including recording prospect data;
- d) means for recording the duration of performance of respective operations in the desired sales communication process; and
- e) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations.

32. The sales support computer of claim 31, wherein the particular interest is selected from the group consisting of safety, economy, performance, style, trailing towing capacity, side airbags, and anti-lock braking.

33. The sales support computer of claim 31, wherein the information about at least one particular interest of the prospect includes information about the composition of the prospect's family.

34. A sales support computer comprising:

- a) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;
- b) means for querying a credit information data store to get an indication of the prospect's creditworthiness;
- c) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said

- 35 -

operations including (1) recording prospect data and (2) telling the prospect about one or more product features suggested by one or more particular interests of the prospect; and

- d) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations.

35. The sales support computer of claim 34, wherein the particular interest is selected from the group consisting of safety, economy, performance, style, trailing towing capacity, side airbags, and anti-lock braking.

36. The sales support computer of claim 34, wherein the information about at least one particular interest of the prospect includes information about the composition of the prospect's family.

37. A sales support computer comprising:

- a) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;
- b) means for querying a credit information data store to get an indication of the prospect's creditworthiness;
- c) means for querying a sales information data store to determine the availability of specific products having one or more features correlated with one or more particular interests of the prospect;
- d) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including (1) recording prospect data and (2) telling the prospect about at least one of said one or more features; and
- e) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations.

- 36 -

38. The sales support computer of claim 37, wherein the particular interest is selected from the group consisting of safety, economy, performance, style, trailing towing capacity, side airbags, and anti-lock braking.

5 39. The sales support computer of claim 37, wherein the information about at least one particular interest of the prospect includes information about the composition of the prospect's family.

40. The sales support computer of claim 37, further comprising means for summoning
10 assistance for the seller.

41. A sales support computer comprising:

- a) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;
- 15 b) means for querying a credit information data store to get an indication of the prospect's creditworthiness;
- c) means for querying a sales information data store to determine the availability of specific products having one or more features correlated with one or more particular interests of the prospect;
- 20 d) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including recording prospect data;
- e) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations; and
- 25 f) means for summoning assistance for the seller

- 37 -

42. The sales support computer of claim 41, wherein the particular interest is selected from the group consisting of safety, economy, performance, style, trailing towing capacity, side airbags, and anti-lock braking.

5 43. The sales support computer of claim 41, wherein the information about at least one particular interest of the prospect includes information about the composition of the prospect's family.

44. A sales support computer comprising:

- 10 a) means for locally storing a copy of at least a portion of a sales information data store external to the sales support computer;
- b) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;
- c) means for querying a credit information data store to get an indication of the
15 prospect's creditworthiness;
- d) means for querying said sales information data store to determine the availability of specific products having one or more features correlated with one or more particular interests of the prospect, including determining whether a communications link exists with the sales information data store, and if so,
20 querying the sales information data store, otherwise querying said locally-stored copy;
- e) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including (1) recording prospect data and (2) telling the prospect about
25 at least one of said one or more features;
- f) means for recording the duration of performance of respective operations in the desired sales communication process;
- g) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations; and

- 38 -

h) means for summoning assistance for the seller.

45. A sales support computer comprising:

- a) means for locally storing a copy of at least a portion of a sales information data store external to the sales support computer;
- b) means for periodically updating said locally-stored copy;
- c) means operable by a seller for recording prospect data about a prospect, including information about at least one particular interest of the prospect;
- d) means for querying a credit information data store to get an indication of the prospect's creditworthiness;
- e) means for determining the availability of specific products having one or more features correlated with one or more particular interests of the prospect, including determining whether a communications link exists with the sales information data store, and if so, querying the sales information data store, otherwise querying said locally-stored copy;
- f) means for prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including (1) recording prospect data and (2) telling the prospect about at least one of said one or more features;
- g) means for recording the duration of performance of respective operations in the desired sales communication process;
- h) means for restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations; and
- i) means for summoning assistance for the seller.

46. A sales support computer comprising:

- a) a processor;
- b) a pen-based user interface;
- c) a wireless communications interface;

- 39 -

- d) a data store;
- e) a program store containing programming executable by the processor for carrying out operations including:
 - 1) downloading, via the wireless communications interface into the data store, a copy of at least a portion of a sales information data store external to the sales support computer;
 - 2) receiving, via the pen-based user interface, data inputted by a seller about a prospect, referred to as prospect data, including information about at least one particular interest of the prospect;
 - 3) querying said sales information data store to determine the availability of specific products having one or more features correlated with one or more particular interests of the prospect, including determining whether a communications link exists with the sales information data store, and if so, querying the sales information data store via the wireless communications interface, otherwise querying said locally-stored copy;
 - 4) prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect; and
 - 5) restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations.

47. A portable sales support computer comprising:

- a) a processor;
- b) a pen-based user interface;
- c) a wireless communications interface;
- d) a data store;
- e) a program store containing programming executable by the processor for carrying out operations including:

- 40 -

- 1) downloading, via the wireless communications interface into the data store, a copy of at least a portion of a sales information data store external to the sales support computer;
- 2) receiving, via the pen-based user interface, data inputted by a seller about a prospect, referred to as prospect data, including information about at least one particular interest of the prospect;
- 3) querying a credit information data store via the wireless communications interface to get an indication of the prospect's creditworthiness;
- 4) querying said sales information data store to determine the availability of specific products having one or more features correlated with one or more particular interests of the prospect, including determining whether a communications link exists with the sales information data store, and if so, querying the sales information data store via the wireless communications interface, otherwise querying said locally-stored copy;
- 5) prompting the seller to perform a specified sequence of operations in a desired sales communication process during a meeting with the prospect, said operations including (1) inputting prospect data and (2) telling the prospect about at least one of said one or more features;
- 6) recording the duration of performance of respective operations in the desired sales communication process;
- 7) restricting the seller's ability to use the sales support computer if the seller does not perform the specified sequence of operations; and
- 8) in response to a command inputted by the seller, transmitting via the wireless communications interface a signal summoning assistance for the seller

1/70

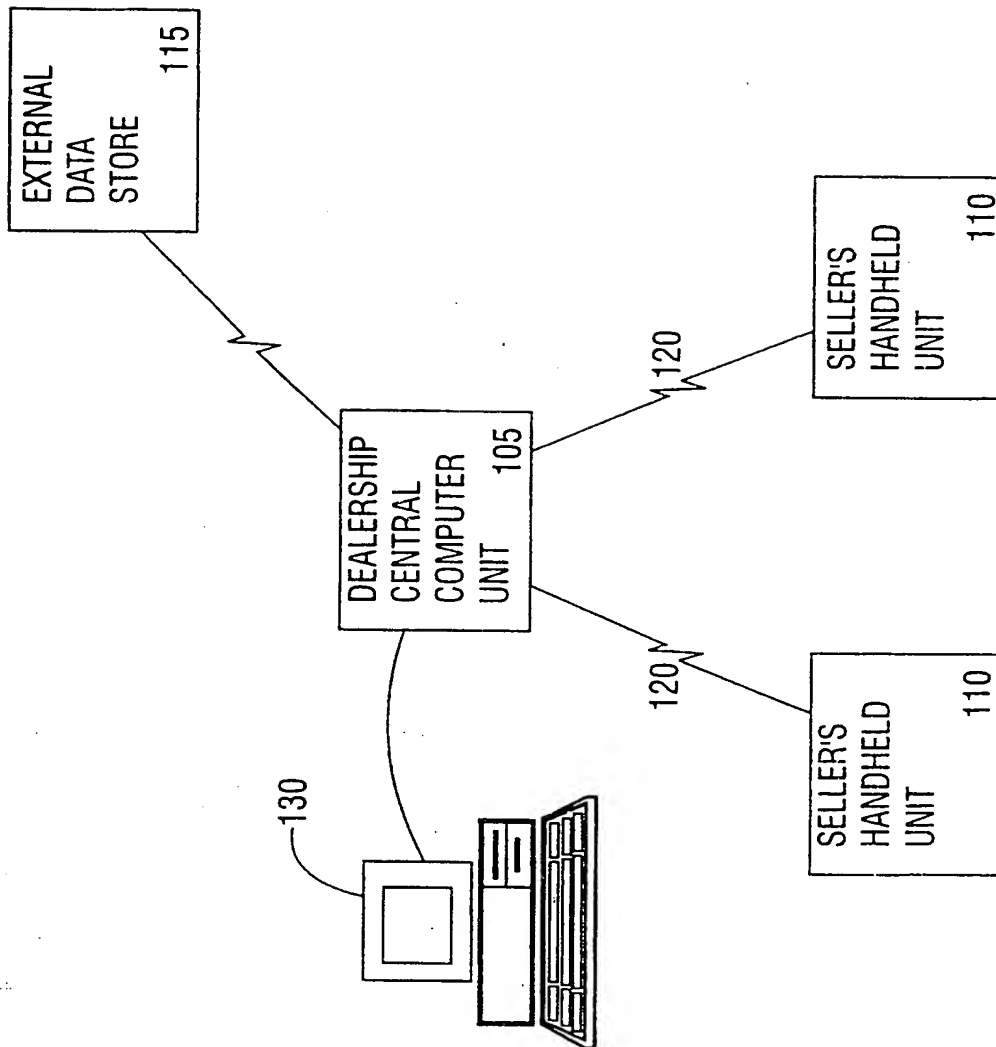


FIG. 1

2/70

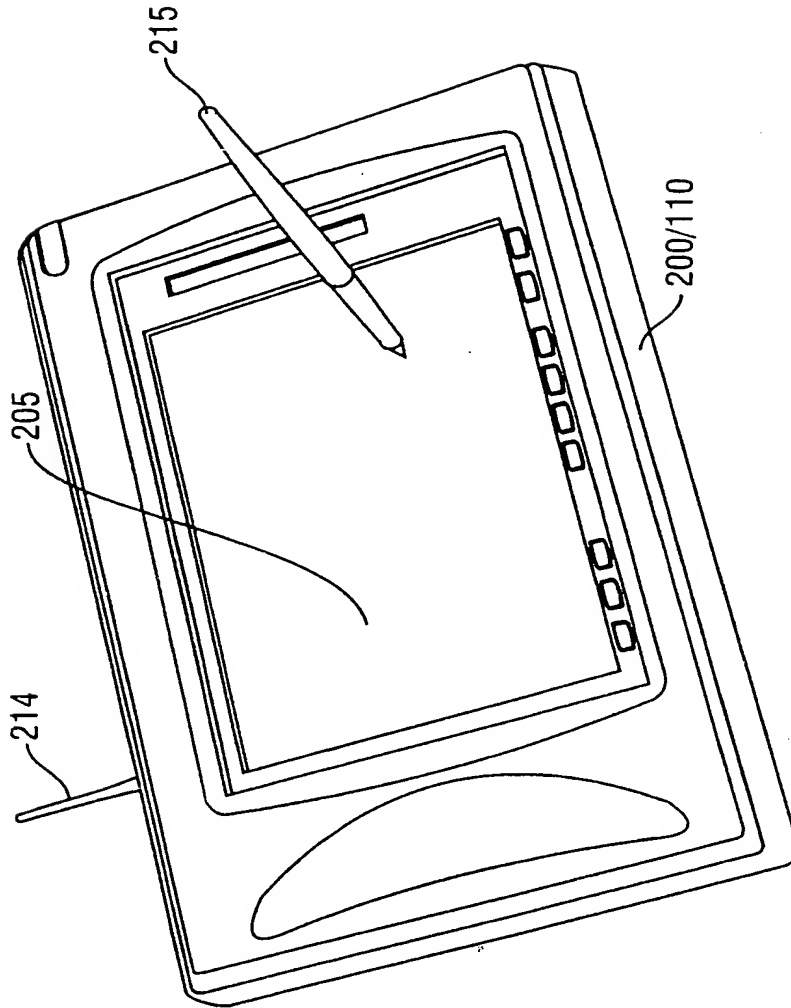


FIG. 2

3/70

| | | | | | | | | | | | | |
|--|-----|---------------|-----|-----------------------------|-----|---------------|-----|---------------|-----|---------------|-----|------------|
| Sales Manager | | | | | | | | | | | | X |
| Show script | | | | | | | | | | | | Manager |
| *GRT | WAN | SEL | PRO | DEN | TRA | SER | WRI | CBI | SOL | DLR | DEL | |
| Name OLSEN,CATHERINE | | | | | | | | | | | | Title Miss |
| Address OLSEN,CATHERINE | | | | | | | | | | | | Company |
| | | | | | | | | | | | | |
| City MISSOURI CITY | | | | State TX | | | | Zip 77459 | | | | |
| County FORT-BEND | | | | Country | | | | United States | | | | |
| Phones Home | | (713)660-7385 | | Work | | (800)999-6348 | | Extension | | 102 | | |
| Pager | | | | Cel | | | | Fax | | (713)827-1200 | | |
| Employer THE CONTINUUM | | | | | | | | | | | | |
| Occupation PROGRAMMER | | | | | | | | | | | | |
| Prospect Type | | First time | | Advertising source | | | | SERVC CUST | | | | |
| INF | | | | | | | | | | | | |
| Prospect info Prospect personal data Co-buyer data Prospect wants Trade-in Trade-in appraisal Vehicle search | | | | | | | | | | | | |
| WAN 0:32 | | 4:44 | | 412496 Miss Catherine Olsen | | | | | | | | |

FIG. 3

4/70

| | | | | | | | | | | | | | | | | | | | | | |
|------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----------------------------------|------------|-----------|------------|-------------------------------------|----------------|----------|--------------------|----------------|---|
| Sales Manager | | | | | | | | | | | | X | | | | | | | | | |
| Show script | | | | | | | | | | | | Close prosp | Manager | | | | | | | | |
| *GRT | WAN | SEL | PRO | DEN | TRA | SER | WRI | CBI | SOL | DLR | DEL | | | | | | | | | | |
| Name | | | | | | | | | | | | OLSEN,CATHERINE | SSN | | | | | | | | |
| Nickname | | | | | | | | | | | | CATHY | Driver lic | 102654852 | State | TX | | | | | |
| Age | | | | | | | | | | | | 25-39 | Birthday | 1/1/1961 | Homeowner | Yes | Class | Woman | | | |
| Internet address | | | | | | | | | | | | | | | | | | | | | |
| Spouse name | | | | | | | | | | | | MIKE | Birthday | | Spouse SSN | | | | | | |
| Hobbies | | | | | | | | | | | | BOATING, CAMPING, GARDENING | | | | Referred by | | | | | |
| Children | | | | | | | | | | | | MIKEY | 10 | | | | | | | | |
| Trade | | | | | | | | | | | | YES | 2A/2N | | #PASS | | | | | | |
| Note | | | | | | | | | | | | WON'T MAKE DECISION WITHOUT SPUSE | | | | | | | | | |
| PER | | | | | | | | | | | | | | | | | | | | | |
| Prospect info | | | | | | | | | | | | Prospect personal data | | | | Co-buyer data | Prospect wants | Trade-in | Trade-in appraisal | Vehicle search | S |
| WAN 0:32 | | | | | | | | | | | | 6:53 | | | | 412496 Miss Catherine "Cathy" Olsen | | | | | |

FIG. 4

5/70

| | | | | | | | | | | | | | | | | | | |
|---------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|--|------------------------|-------------------------------------|----------------|----------|--------------------|----------------|
| Sales Manager | | | | | | | | | | | | | X | | | | | |
| Show script | | | | | | | | | | | | | Manager | | | | | |
| *GRT | WAN | SEL | PRO | DEN | TRA | SER | WRI | CBI | SOL | DLR | DEL | | | | | | | |
| Name | | | | | | | | | | | | | OLSEN, MIKE | Title | Mr | SSN | | |
| Address | | | | | | | | | | | | | 12334 KIOWA RIVER | | | | | |
| City | | | | | | | | | | | | | MISSOURI CITY | State | TX | Zip | 77459 | |
| County | | | | | | | | | | | | | FORT BEND | Country | United States | | | |
| Phones | | | | | | | | | | | | | Home | (713)660-7385 | Work | | Extension | |
| Employer | | | | | | | | | | | | | | | | | | |
| Occupation | | | | | | | | | | | | | | | | | | |
| Dirver lic. | | | | | | | | | | | | | | State | | Birthday | | |
| Prospect info | | | | | | | | | | | | | Prospect personal data | Co-buyer data | Prospect wants | Trade-in | Trade-in appraisal | Vehicle search |
| WAN 0:32 | | | | | | | | | | | | | 8:04 | 412496 Miss Catherine "Cathy" Olsen | | | | |

FIG. 5

6/70

| Sales Manager | | | | | | | | | | | | X | | |
|---|-----|--|----------|-------------------------------------|------|--|-----|---------|-------------|---|-----|------------------|--|--------|
| <div>Show script</div> <div>Close prosp</div> | | | | | | | | | | | | Manager | | |
| *GRT | WAN | SEL | PRO | DEN | TRA | SER | WRI | CBI | SOL | DLR | DEL | | | |
| New/Used | | New | Low year | | 1997 | High year | | 1997 | Car/Truck | | Car | | | |
| Make | | FORD | | | | Transmission | | | Air cond. | | | | | |
| Series | | | | | | Engine | | | No. of cyl. | | | | | |
| Model # | | | | | | Fuel type | | | | | | | | |
| Vehicle Type | | <input type="checkbox"/> Car <input type="checkbox"/> Sport Utility <input type="checkbox"/> Truck <input type="checkbox"/> Van | | Seating capacity | | <input type="checkbox"/> 2 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 | | Body | | <input type="checkbox"/> 2 door <input type="checkbox"/> 3 door <input type="checkbox"/> 4 door <input type="checkbox"/> Convertible | | Age | | |
| Class | | <input type="checkbox"/> Luxury <input type="checkbox"/> Sport <input type="checkbox"/> Standard | | Group | | <input type="checkbox"/> Full size <input type="checkbox"/> Mid size <input type="checkbox"/> Small | | Drive | | <input type="checkbox"/> FWD <input type="checkbox"/> RWD <input type="checkbox"/> AWD <input type="checkbox"/> 4WD | | Principal driver | | |
| WANTS 1 | | CD | | WANTS 2 | | LEATHER | | WANTS 2 | | ABS | | Mileage/year | | 20,000 |
| Budget/month | | 500 | | Downpmt | | 1200 | | | | | | | | |
| <div>Prospect info</div> <div>Prospect personal data</div> <div>Co-buys data</div> <div>Prospect wants</div> <div>Trade-in</div> <div>Trade-in appraisal</div> <div>Vehicle search</div> <div>S</div> | | | | | | | | | | | | WAN | | |
| WAN 0:32 | | 10:31 | | 412496 Miss Catherine "Cathy" Olsen | | | | | | | | | | |

FIG. 6

7/70

| | | | | | | | | | | | | | |
|---|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-------------|---------|
| Sales Manager | | | | | | | | | | | | X | |
| Show script | | | | | | | | | | | | Close prosp | Manager |
| *GRT | WAN | SEL | PRO | DEN | TRA | SER | WRI | CBI | SOL | DLR | DEL | | |
| No trade? <input type="checkbox"/> VIN <input type="text"/> Mlg <input type="text"/> Year <input type="text"/> 1995 Make <input type="text"/> FORD Model <input type="text"/> TAURUS Series <input type="text"/> Body <input type="text"/> Color group <input type="text"/> Color <input type="text"/> Car/Truck <input type="text"/> Car Transmission <input type="text"/> AT Engine <input type="text"/> 6CY Condition <input type="text"/> GOOD Air cond. <input type="text"/> License <input type="text"/> TX <input type="text"/> 123765 No. of cyl. <input type="text"/> 6 Odometer <input type="text"/> 67000 Fuel type <input type="text"/> Unleaded Balance due <input type="text"/> 2500 to <input type="text"/> FMCC ACV <input type="text"/> 9000 Gross value <input type="text"/> 9000 TRA | | | | | | | | | | | | | |
| Prospect info / Prospect personal data / Co-buys data / Prospect wants / Trade-in / Trade-in appraisal / Vehicle search / S / < > | | | | | | | | | | | | | |
| WAN 0:32 20:55 412496 Miss Catherine "Cathy" Olsen | | | | | | | | | | | | | |

FIG. 7

8/70

| | | | | | | | | | | | | |
|---|-----|-------|-----|-------------------------------------|-----|-----|-----|-----|-----|-------------|-----|---------|
| Sales Manager | | | | | | | | | | | | X |
| Show script | | | | | | | | | | Close prosp | | Manager |
| *GRT | WAN | SEL | PRO | DEN | TRA | SER | WRI | CBI | SOL | DLR | DEL | |
| <div>Print trade-in appraisal at station</div> <div>Verbal request for trade appraisal made to THOMPSON</div> <div>Print</div> | | | | | | | | | | | | |
| <div>Prospect info</div> <div>Prospect personal data</div> <div>Co-buys data</div> <div>Prospect wants</div> <div>Trade-in</div> <div>Trade-in appraisal</div> <div>Vehicle search</div> <div>APP</div> | | | | | | | | | | | | |
| WAN 0:32 | | 21:24 | | 412496 Miss Catherine "Cathy" Olsen | | | | | | | | |

FIG. 8

9/70

| Sales Manager | | | | | | | | | | | | X | | | | |
|---|-----|-----|-----|-----|-----|--|-----|-----|-----|-----|-----|---|---|---|--|---|
| <div> <div>Show script</div> <div>Close prosp</div> <div>Manager</div> </div> | | | | | | | | | | | | | | | | |
| *GRT | WAN | SEL | PRO | DEN | TRA | SER | WRI | CBI | SOL | DLR | DEL | | | | | |
| <div>Attributes and Price/Payment</div> <div>Options</div> | | | | | | | | | | | | | | | | |
| <div> <div>New/Used</div> <div>New</div> </div> | | | | | | <div> <div>Vehicle Type</div> <div> <input type="checkbox"/> Car <input type="checkbox"/> Sport Utility <input type="checkbox"/> Truck <input type="checkbox"/> Van </div> </div> | | | | | | <div> <div>Seating capacity</div> <div> <input type="checkbox"/> 2 <input type="checkbox"/> 4 <input type="checkbox"/> 5 <input type="checkbox"/> 6 <input type="checkbox"/> 7 <input type="checkbox"/> 8 <input type="checkbox"/> 12 </div> </div> | <div> <div>Body</div> <div> <input type="checkbox"/> 2 door <input type="checkbox"/> 3 door <input type="checkbox"/> 4 door <input type="checkbox"/> Convertible </div> </div> | <div> <div>Class</div> <div> <input type="checkbox"/> Luxury <input type="checkbox"/> Sport <input type="checkbox"/> Standard </div> </div> | <div> <div>Group</div> <div> <input type="checkbox"/> Full size <input type="checkbox"/> Mid size <input type="checkbox"/> Small </div> </div> | <div> <div>Drive</div> <div> <input type="checkbox"/> FWD <input type="checkbox"/> RWD <input type="checkbox"/> AWD <input type="checkbox"/> 4WD </div> </div> |
| <div> <div>Low year</div> <div>1997</div> </div> | | | | | | <div> <div>Payment from</div> <div>500</div> <div>to</div> <div>500</div> <div>Tier</div> <div>A</div> </div> | | | | | | | | | | |
| <div> <div>High year</div> <div>1997</div> </div> | | | | | | <div> <div>List price from</div> <div></div> <div>to</div> <div></div> </div> | | | | | | | | | | |
| <div> <div>Make</div> <div>FORD</div> </div> | | | | | | <div> <div>Search</div> <div>Clear screen</div> </div> | | | | | | | | | | |
| <div> <div>Make</div> <div>MUSTANG</div> </div> | | | | | | <div> <div>Prospect info</div> <div>Prospect personal data</div> <div>Co-buys data</div> <div>Prospect wants</div> <div>Trade-in</div> <div>Trade-in appraisal</div> <div>Vehicle search</div> <div>SEL</div> </div> | | | | | | | | | | |
| <div> <div>Series</div> <div></div> </div> | | | | | | <div> <div>WAN 0:32</div> <div>22:33</div> <div>412496 Miss Catherine "Cathy" Olsen</div> </div> | | | | | | | | | | |
| <div> <div>Body</div> <div></div> </div> | | | | | | | | | | | | | | | | |

FIG. 9

10/70

| | | | | | | | | | | | | | | | |
|---------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-------------|--|---------|--|
| Sales Manager | | | | | | | | | | | | X | | | |
| Show script | | | | | | | | | | | | Close prosp | | Manager | |
| *GRT | WAN | SEL | PRO | DEN | TRA | SER | WRI | CBI | SOL | DLR | DEL | | | | |

| | | | | | | | | | | | | | | | | | | | |
|------------------------------|--|--|--|---------|--|--|--|--------------------|--|--|--|------------|--|--|--|------------------|--|--|--|
| Attributes and Price/Payment | | | | | | | | | | | | Options | | | | | | | |
| New/Used | | | | New | | | | Color group | | | | Color code | | | | Trim | | | |
| Low year | | | | 1997 | | | | Transmission | | | | Engine | | | | Quick spec | | | |
| High year | | | | 1997 | | | | Include options | | | | | | | | | | | |
| Make | | | | FORD | | | | Exclude options | | | | | | | | | | | |
| Make | | | | MUSTANG | | | | | | | | | | | | | | | |
| Series | | | | | | | | | | | | | | | | | | | |
| Body | | | | | | | | Mileage from | | | | to | | | | | | | |
| | | | | | | | | Include statuses | | | | OBDRF | | | | Include on order | | | |
| | | | | | | | | Days in stock from | | | | to | | | | Spi# | | | |

| | | | |
|--------|--|--------------|--|
| Search | | Clear screen | |
|--------|--|--------------|--|

| | | | | | | | | | | | | | | | |
|---------------|--|------------------------|--|-------------------------------------|--|----------------|--|----------|--|--------------------|--|----------------|--|-----|--|
| Prospect info | | Prospect personal data | | Co-buys data | | Prospect wants | | Trade-in | | Trade-in appraisal | | Vehicle search | | SEL | |
| WAN 0:32 | | 22:47 | | 412496 Miss Catherine "Cathy" Olsen | | | | | | | | | | S | |

FIG. 10

11/70

| Vehicles found | | | | |
|----------------|---------|---------|------------|---------------------|
| 00031456 | 97 FORD | MUSTANG | 2DR CNV | 1FALP4443VF201267 R |
| 00031705 | 97 FORD | MUSTANG | 2DR CNV | 1FALP4448VF208280 R |
| CJB00011 | 97 FORD | MUSTANG | 2DR CPE GT | 1FALP42X0VF120241 F |
| CJB00010 | 97 FORD | MUSTANG | 2DR CPE GT | 1FALP42X4VF116208 F |

| | | | | |
|--|--|----------------------|--------------|-----------|
| Vehicle: New 1997 FORD MUSTANG 2DR CNV 3 P44 | | | | |
| List: 23590 | Calc: 23945 | Cost: | Calc: 21752 | Acct: 100 |
| Mileage: 12 | Spi#: | G'VW: | Whbse: 101.3 | |
| Color: RIO RED TINTED CLEARCDAT | Trim: SADDLE CLOTH BUCKETS | | | |
| Engine: ENGINE-3.8L EFI V6 | Trans: AUTO OVERDRIVE TRANSMISSION | | | |
| Status: (R) READY TO SELL | In stock: 2 | Location: FORD SALES | | |
| Package: 243A | Options: 572 63A 143 217 132 994 44U M 12H 20A | | | |

FIG. 11

12/70

| | | | | | | | | | | | |
|---|--|--|--|--|--|--|--|--|--|-------------------------------------|--|
| Sales Manager | | | | | | | | | | <input checked="" type="checkbox"/> | |
| Show script | | | | | | | | | | Close prosp | |
| *GRT WAN SEL PRO DEN TRA SER WRI CBI SOL DLR DEL | | | | | | | | | | Manager | |
| Description 1997 FORD MUSTANG 2DR CNV ED | | | | | | | | | | | |
| Stock number 00031456 VIN 1FALP4443VF201267 | | | | | | | | | | | |
| List 23945 Price 23000 | | | | | | | | | | | |
| Hold for salesman | | | | | | | | | | | |
| VEH | | | | | | | | | | | |
| a Co-buys data Prospect wants Trade-in Trade-in appraisal Vehicle search Selected vehicle Credit Bureau Inquiry P | | | | | | | | | | | |
| WAN 0:32 4:44 412496 Miss Catherine Olsen | | | | | | | | | | | |

FIG. 12

13/70

| Sales Manager | | | | | | | | | | X | |
|--|-----|-----|-----|-----|-----|-----|-----|-----|-----|---------|-----|
| <div>Show script</div> <div>Close prosp</div> | | | | | | | | | | Manager | |
| *GRT | WAN | SEL | PRO | DEN | TRA | SER | WRI | CBI | SOL | DLR | DEL |
| Bureau to be inquired: CBI <input type="checkbox"/> Yes <input type="checkbox"/> No TRU <input type="checkbox"/> Yes <input type="checkbox"/> No Auto print <input type="checkbox"/> No Auto flush <input type="checkbox"/> No | | | | | | | | | | | |
| Options: CBI: SSN Search <input type="checkbox"/> Yes <input type="checkbox"/> No Phone code <input type="text" value="5"/> Report options <input type="text" value=""/> TRU: Phone code <input type="text" value="3"/> Report options <input type="text" value="012"/> TRW: SSN Search <input type="checkbox"/> No <input type="checkbox"/> Yes Phone code <input type="text" value="2"/> Credit phone list <input type="text" value="No"/> | | | | | | | | | | | |
| Last <input type="text" value="OLSEN"/> First <input type="text" value="CATHERINE"/> Middle <input type="text" value=""/> Title <input type="text" value=""/> SSN <input type="text" value=""/> Employer <input type="text" value="THE CONTINUUM"/> Joint inquiry <input type="checkbox"/> No <input type="checkbox"/> Yes Spouse's first name <input type="text" value="MIKE"/> SSN <input type="text" value=""/> | | | | | | | | | | | |
| Current address: Number <input type="text" value="12334"/> Street <input type="text" value="KIOWA RIVER"/> City <input type="text" value="MISSOURI CITY"/> State <input type="text" value="TX"/> ZIP <input type="text" value="77453"/> Route <input type="text" value=""/> Box <input type="text" value=""/> | | | | | | | | | | | |
| Former address: Number <input type="text" value=""/> Street <input type="text" value=""/> City <input type="text" value=""/> State <input type="text" value=""/> ZIP <input type="text" value=""/> Route <input type="text" value=""/> Box <input type="text" value=""/> | | | | | | | | | | | |
| <div>Send</div> | | | | | | | | | | | |
| a Co-buys data <input type="checkbox"/> Prospect wants <input type="checkbox"/> Trade-in <input type="checkbox"/> Vehicle search <input type="checkbox"/> Selected vehicle <input type="checkbox"/> Credit Bureau inquiry <input type="checkbox"/> CBI | | | | | | | | | | | |
| WAN 0:32 24:00 412496 Miss Catherine "Cathy" Olsen | | | | | | | | | | | |

FIG. 13

14/70

| | | | | | | | | | | | | | |
|---|--|--|--|--|--|--|--|--|--|--|--|-------------------------------------|--|
| Sales Manager | | | | | | | | | | | | <input checked="" type="checkbox"/> | |
| Show script | | | | | | | | | | | | Close prosp | |
| <div> <div>*GRT</div> <div>WAN</div> <div>SEL</div> <div>PRO</div> <div>DEN</div> <div>TRA</div> <div>SER</div> <div>WRI</div> <div>CBI</div> <div>SOL</div> <div>DLR</div> <div>DEL</div> </div> | | | | | | | | | | | | Manager | |
| <div> <div>Stock number</div> <div>00031456</div> <div>1997</div> <div>FORD</div> <div>MUSTANG</div> <div>2DR CNV</div> <div>E8</div> </div> | | | | | | | | | | | | | |
| <div> <div>Customer Offer</div> <div>Management Offer (display only)</div> </div> | | | | | | | | | | | | | |
| <div> <div> <input checked="" type="checkbox"/> 01-FINANCE <input type="checkbox"/> 10-BALLOOM <input type="checkbox"/> 01-LEASE <input checked="" type="checkbox"/> CASH </div> <div> <input type="checkbox"/> 01-FINANCE <input checked="" type="checkbox"/> 10-BALLOOM <input checked="" type="checkbox"/> 01-LEASE <input checked="" type="checkbox"/> CASH </div> </div> | | | | | | | | | | | | | |
| <div> <div> <div>Price</div> <div>23000.00</div> <div>Estimated Trade value</div> <div>9000.00</div> </div> <div> <div>Down pmt</div> <div>1200.00</div> <div>Trade payoff</div> <div>2500.00</div> </div> <div> <div>Rebate</div> <div></div> <div>Payment</div> <div></div> </div> <div> <div>Term</div> <div></div> <div>APR</div> <div>10.00</div> </div> <div> <div>Quote has been logged</div> <div>Buyer's Order</div> </div> </div> | | | | | | | | | | | | | |
| <div> <div> <div>Price</div> <div>23000.00</div> <div>Estimated Trade value</div> <div>9000.00</div> </div> <div> <div>Down pmt</div> <div>1200.00</div> <div>Trade payoff</div> <div>2500.00</div> </div> <div> <div>Rebate</div> <div></div> <div>Payment</div> <div>500.00</div> </div> <div> <div>Term</div> <div></div> <div>APR</div> <div>10.00</div> </div> <div> <div>Submit to Power Workstation #</div> <div>W3J</div> </div> <div> <div>Comment</div> <div></div> </div> </div> | | | | | | | | | | | | | |
| <div> <div>Last activity: Counter-offer received</div> <div>Submit offer</div> <div>Start over</div> <div>Counter-offers</div> <div>Comment</div> </div> | | | | | | | | | | | | | |
| <div> <div>Trade-in</div> <div>Trade-in appraisal</div> <div>Vehicle search</div> <div>Selected vehicle</div> <div>Credit Bureau Inquiry</div> <div>Prospect offer</div> <div>Sold</div> <div>Delivered</div> </div> | | | | | | | | | | | | | |
| <div> <div>WAN 0:32</div> <div>27:34</div> <div>412496 Miss Catherine "Cathy" Olsen</div> </div> | | | | | | | | | | | | | |

FIG. 14

15/70

| | | | | | | | | | | | | |
|---|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|---------|
| Sales Manager | | | | | | | | | | | | X |
| Show script | | | | | | | | | | | | Manager |
| *GRT | WAN | SEL | PRO | DEN | TRA | SER | WRI | CBI | SOL | DLR | DEL | |
| <p>Name OLSEN, CATHERINE</p> <p>Prospect 412496</p> <p>VIN</p> <p>Stock</p> <p>Description</p> <p>This unit is sold Yes</p> | | | | | | | | | | | | |
| <p>Trade-in Trade-in appraisal Vehicle search Selected vehicle Credit Bureau Inquiry Prospect offer Sold Delivered</p> | | | | | | | | | | | | SOL |
| <p>WAN 0:36 29:29 412496 Miss Catherine "Cathy" Olsen</p> | | | | | | | | | | | | |

FIG. 15

16/70

| | | | | | | | | | | | | |
|---|-----|-------|-----|-------------------------------------|-----|-----|-----|-----|-----|-----|-----|-------------|
| Sales Manager | | | | | | | | | | | | X |
| Show script | | | | | | | | | | | | Close prosp |
| *GRT | WAN | SEL | PRO | DEN | TRA | SER | WRI | CBI | SOL | DLR | DEL | Manager |
| <div>Name</div> <div>OLSEN, CATHERINE</div> <div>Prospect</div> <div>412496</div> <div>VIN</div> <div>Stock</div> <div>Description</div> <div>This unit is delivered</div> | | | | | | | | | | | | |
| <div>Trade-in</div> <div>Trade-in appraisal</div> <div>Vehicle search</div> <div>Selected vehicle</div> <div>Credit Bureau Inquiry</div> <div>Prospect offer</div> <div>Sold</div> <div>Delivered</div> | | | | | | | | | | | | DEL |
| WAN 0:36 | | 29:29 | | 412496 Miss Catherine "Cathy" Olsen | | | | | | | | |

FIG. 16

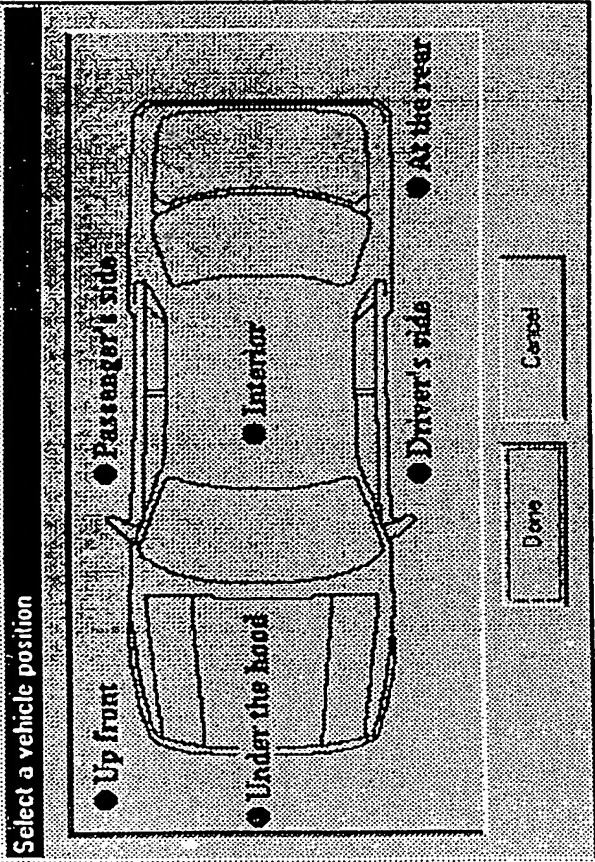


FIG. 17

| | | | |
|---|------|----------|-------|
| Speed Control | Next | Previous | More? |
| Interior | | | |
| For relaxed highway cruising, this vehicle has Speed Control with convenient steering wheel-mounted controls. | | | |

FIG. 18

19/70

| | | | |
|--|--|-------|----------|
| Speed Control | | | |
| | | Next | Previous |
| | | More? | |
| Interior | | | |
| <p>This is how it works:</p> <ul style="list-style-type: none"> - Press the ON switch and press SET ACCEL at the desired speed. - To speed up, press and hold SET ACCEL. To slow down, press COAST. - Touching the brake pedal returns the car to foot control. | | | |

FIG. 19

20/70

| | | | |
|---|--|---------|--|
| Sales Manager | | X | |
| Show script | | Manager | |
| <div> <div>*Name</div> <div>OLSEN, CATHERINE</div> <div></div> </div> <div> <div>Phones</div> <div>Home</div> <div>(713)660-7385</div> <div>Work</div> <div>(800)999-6348</div> <div>Extension</div> <div>102</div> </div> <div> <div>Beback date</div> <div></div> <div>Time</div> <div></div> </div> <div> <div>*Tickle date</div> <div>9/3/1997</div> <div>Disposition</div> <div></div> </div> <div> <div>*Prospect type</div> <div>First time</div> <div>*Advertising source</div> <div>SERV CUST</div> </div> <div> <div>*Up</div> <div></div> </div> | | | |
| <div> <div>Main Menu</div> <div>Cancel</div> </div> | | BEB | |
| <div> <div>* These are the minimum required fields necessary to close the prospect and return to the Main menu.</div> </div> | | | |
| WAN 0:05 | | 38:10 | |
| 412496 Miss Catherine "Cathy" Olsen | | | |

FIG. 20

21/70

| | | |
|---|-------------------------------|------------------------------------|
| | | |
| | | <div>Top</div> <div>Previous</div> |
| <p>Welcome to ABC Motors, How may i assist you today?</p> | | |
| <div>We need a new car</div> | <div>We're just looking</div> | <div>How much is this car</div> |

FIG. 21

| LINE NUMBER | PRINT 415 RECORDS - REPORT 022 | RUN 09/10/97 15:35:40 | PAGE- |
|-------------|---|-----------------------|---------------------------------|
| STEP SEQ | SCRIPT TEXT | ANSWER | GOTO PUT DATA IN FIELD STEP SEQ |
| 01 | 0000 Let's get you started on the credit application. Fill in all of the lines on both sides of the page. When you are done, you and I will go over it to make sure it is complete. | Continue | CBI 0000 |
| 02 | 0000 While you're filling that out, I'll need to see your driver's license and I need your social security number. | Continue | CBI 0010 |
| 03 | 0000 Enter Social Security number: | Continue | CBI 0040 |
| 04 | 0000 Enter Driver's license number: | Continue | BUYERSEN |
| 05 | 0000 Enter Driver's license state: | Continue | DRIVERSLICST CBI 0050 |
| 06 | 0000 Enter Address. Is it correct on the license? | Continue | DRIVERSLICNO |
| 07 | 0000 Enter Zip Code. Is it correct on the license? | Continue | DRIVERSLICST |
| 08 | 0000 Let's review the credit application, and then I'll take it to the Business Manager. | Continue | CBI 0070 |
| 09 | 0000 | Continue | BUYERADORI |
| 10 | 0000 | Continue | BUYERZIP |
| 11 | 0000 | Continue | CBI 0080 |
| 12 | 0000 | Continue | CBI 9999 |

FIG. 22

| PRINT 415 RECORDS - REPORT 022 | | RUN 09/10/97 15:35:40 | | PAGE 3 | |
|--------------------------------|--|-----------------------|---------------|--------------------------|----------|
| STEP SEQ | SCRIPT TEXT | ANSWER | GOTO PUT DATA | IN FIELD | STEP SEQ |
| DEL 0010 | When the business manager has finished with your customers, you will receive a page asking you to come to his office. Take your customers to your office and complete the delivery process. Review contents of the New Vehicle Packet. | Continue | | | DEL 0020 |
| DEL 0020 | <ul style="list-style-type: none"> Show your customer where the service write-up area is. Introduce your customer to a Service Advisor. Give him/her the scheduled maintenance book. Remind him/her of the three free LOF in the front of the book. | Continue | | | DEL 0030 |
| DEL 0030 | Before introducing the Service Advisor, say: You will be assigned your own personal service advisor. This means that they get to know your vehicles, and they ensure that you are completely satisfied on every visit. | Continue | | | DEL 0040 |
| DEL 0040 | Tell the customer how convenient service's hours are: Our Service Department is convenient for both pick-up and drop-off customers. Service is open from 7:30am to 7:30pm, Monday through Friday, and by appointment on Saturday. | Continue | | | DEL 0050 |
| DEL 0050 | Inspect the vehicle while filling out and reviewing the Ford Quality Commitment Delivery Checklist. Now say: In approximately two to three weeks you will receive a survey like this one from Ford Motor Company. The survey will ask you questions concerning your sales experience at ABC Motors. | Continue | | | DEL 0060 |
| DEL 0060 | We take pride in our customer satisfaction rating. Your COMPLETE satisfaction is our Number 1 goal. Entourage into Ford's Elite Masters Sales Program and part of my compensation is determined by your rating of "2A", which rates your overall purchase/lease experience, | Continue | | | DEL 0070 |
| DEL 0070 | and "2N", which rates the overall condition of your vehicle at time of delivery. Do you feel you can rate both those areas as | TEN LESS THAN 10 | 10 <10 | BUYERMISC2 BUYERMISC2 | DEL 0080 |

FIG. 23

| | | | | | |
|--|----------------------------------|--|--|----------|------------------------|
| completely satisfied? | | | | | |
| 1. If no to Turn the Quality Commitment Performance Checklist so they can see it, and say: Great, I'll make a note of that. | Continue | | | | DEL 01/00 |
| 2. If yes What can I do to correct the issue NOW, TODAY? Listen carefully to what your customer has to say. Take notes if necessary so he'll know you are paying attention. | Continue | | | | DEL 01/00 |
| 3. If yes to 2 of responses, the issues raised at delivery are: a. We're not the OK, I know he'll want to hear about this. | Continue - Cust OK Talk to GM | | | LASTNOTE | DEL 01/00 DEL 01/00 |

FIG. 24

| PRINT 415 RECORDS - REPORT 022 | | | | RUN 09/10/97 15:35:40 | | PAGE= 4 |
|--|---------------------------------|---------------|----------|-----------------------|------|---------|
| SCRIPT TEXT | ANSWER | GOTO PUT DATA | IN FIELD | STEP | SEQ | |
| - Let's take it back to service and have them look at it now. | Go to Service Talk to Dealer | | | DEL | 0093 | |
| - I apologize, I didn't realize you felt this way. What can I do to right this situation? Would it help to speak to the Dealer or the General Manager? | | | | DEL | 0094 | |
| - Well, if you think of anything more you think I can do to right your satisfaction, please CALL me. | Continue | | | DEL | 0095 | |
| - Let's go find the GM for you right now and we'll get this right for you. | Continue | | | DEL | 0096 | |
| - Let's go back to SERVICE right now and we'll get it straight. | Continue | | | DEL | 0097 | |
| - Let's go find the DEALER for you right now and we'll get this right for you. | Continue | | | DEL | 0098 | |
| - Well, I'm glad we straightened that out. I have one more question for you.... | Continue | | | DEL | 0099 | |
| - Will you help me increase my business by giving me just one REFERRAL? | Yes Nobody | | | DEL | 0100 | |
| - Ever? And attach to your notes in front of the customer. Thank you, I appreciate this. | Continue | | | DEL | 0101 | |
| - You may get a lot of attention in the next few days from your friends, neighbors, and co-workers with your new vehicle. If one of them expresses interest in buying a new vehicle, will you give them my card and recommend they call me? Here's an extra business card. | | | | DEL | 0102 | |
| - And if they come in and end up buying a new or used vehicle, I'll give you a \$25 coupon for The Macaroni Grill to show my appreciation. | Continue | | | DEL | 0103 | |
| LASTNOTE | | | | | | |

FIG. 25

| | | | |
|----------|---|----------|----------|
| DEL 0140 | BEFORE YOU LEAVE YOUR VEHICLE FROM APRIL 1998, I HAVE ONLY TO ONLY THE BEGINNING OF OUR BUSINESS RELATIONSHIP. | Continue | DEL 0140 |
| DEL 0140 | I'll call you in a few days to see if you have any questions about your new vehicle and to see how you like your new vehicle. | Continue | DEL 0140 |
| DEL 0140 | PLEASE REMEMBER THAT WE ARE MAKING THE SALE! IT CONTINUE AND THEN CLOSE THROUGH TO BEGIN YOUR NEXT SALE. | Continue | DEL 0140 |
| BEB | | | |

FIG. 26

| STEP NO. | SCREEN TEXT | ANSWER | GOTO PUT DATA | IN FIELD | STEP SEQ. |
|----------|---|-----------------------------|---------------|----------|--|
| DEM 0140 | Let me start the car, and I'll show you more about the interior of this vehicle. | OK No time Not buying | | | DEM 0140 DEM 0110 DEM 0120 |
| DEM 0110 | I understand that you are in a hurry. But for each car you drive, you want pain a better feel for exactly what you want in a vehicle, and you will actually save time in selecting the vehicle you want. | OK No really, no time | | | DEM 0140 DEM 0110 |
| DEM 0120 | That's a smart way to shop for vehicles. Since you are just beginning your search for a new vehicle, you will want to start getting a feel for what you like and don't like in a vehicle. The best way to do just that is to sit in the car for just a few minutes. | Continue | | | DEM 0111 |
| DEM 0111 | OK No | | | | DEM 0140 DEM 0130 |
| DEM 0130 | OK No time Not ready Not buying | | | | DEM 0140 DEM 0130 DEM 0120 DEM 0110 |
| DEM 0140 | OK No really, no time | | | | DEM 0140 DEM 0130 |

FIG. 27

become a little more familiar with this vehicle.

DEM 0170 Not Ready:

- I understand how you feel.
- I once felt that way myself when I first began to search for a new car.
- But I found that by driving each vehicle that interested me, I was better able to define what I did and didn't like and it actually made my search easier.

OK

Really, not ready

DEM 0200

DEM 0190

DEM 0180 Not buying today: That's fine. Let me show you the

- comfortable ride this vehicle offers. No one can make you buy a vehicle just for test driving it.

OK

No

DEM 0210

DEM 0190

FIG. 28

PRINT 415 RECORDS - REPORT 022 RUN 09/10/97 15:35:40 PAGE= 6

| STEP SEQ | SCRIPT TEXT | ANSWER | GOTO PUT DATA | IN FIELD | STEP SEQ |
|----------|--|--|---------------|-------------|--|
| 001 | Will let's make an appointment for you to come in and spend a little time in this vehicle. Are you free tonight? How about tomorrow evening? Which is best for you? | OK No | | | DEM 0191 DEM 1020 |
| 002 | What time is more convenient for you? Let me mark it in my schedule here. | Continue | | APPTDATE | |
| 003 | Now, you will call me if something changes on your end, won't you? And I'll do the same for you if something changes on my end. Where can I reach you -or- your answering machine? | Home Phone Work Phone Cell Phone No Phone Given | | APPTTIME | DEM 0196 DEM 0197 DEM 0198 DEM 0199 |
| 004 | OK, Home phone: | Continue Work# also given | | BUYERHOMEPH | DEM 0199 DEM 0197 |
| 005 | OK, Work phone: | Continue Cell# also given | | BUYERWORKPH | DEM 0199 DEM 0198 |
| 006 | OK, Cell phone: | Continue Home# also given | | | DEM 0199 DEM 0196 |
| 007 | Great, I'll see you then. | Continue | BEB | | DEM 9999 |
| 008 | Here: When on the demo ride, be sure to let all drivers take a turn behind the wheel. Sit in the back if there is another driver in the group. He or she will enjoy the ride more in the passenger seat. | Continue | | | DEM 0210 |
| 009 | I think you'll find you like how this vehicle rides. We'll take it on the highway if you like. First take a right onto the feeder and then take another right at the first street you see. | Continue | | | DEM 0220 |

FIG. 29

| DEM 0230 | DEM 0230 |
|---|----------|
| See these trees on the edge of the lot? | Continue |
| Mr. Jones planted those when he built this dealership back in 1955. We have a picture of the dealership back then, you can see how small the trees were. It's hard to believe we've been servicing people here at ABC Motors for over 40 years. Remind me to show you the picture when we get back. | |
| DEM 0240 What made you decide to look at this vehicle? | Continue |
| | LASTNOTE |
| DEM 0250 Mr. Jones: On the demo drive, point out features the prospect has shown an interest in during the product presentation. | Continue |
| | DEM 0250 |

FIG. 30

PRINT 415 RECORDS - REPORT 022

RUN 09/10/97 15:35:40

PAGE= 7

| STEP SEQ | SCRIPT TEXT | ANSWER | GOTO PUT DATA | IN FIELD | STEP SEQ |
|----------|---|----------|---------------|----------|----------|
| | NOTE the three items the prospect stated he really WANTS in a vehicle are displayed behind this script. Try to get the prospect to give a YES response to your questions, which VALIDATES that the vehicle does meet their wants. | | WAN | | |
| DEM 0360 | This vehicle sure has great response, doesn't it? | Yes | | | DEM 0360 |
| | The stereo system in this vehicle sure sounds good, doesn't it? | No | | | DEM 0360 |
| | | Continue | | | DEM 0310 |
| DEM 0360 | Notice the leg room, and there's still plenty of room in the back. You'll be able to fit your family or friends in here comfortably, right? | Yes | | | DEM 0310 |
| | | No | | | DEM 0300 |
| | | Continue | | | DEM 0310 |
| DEM 0360 | Responses to No answers are: - Why do you say that? - Would you elaborate? - I understand. - OK, just move on to the next question without responding. | Continue | | | DEM 0310 |
| DEM 0360 | Where is the first place you would take you new vehicle? Who is the first person you would take for a drive in your new vehicle? | Continue | | | DEM 0320 |
| DEM 0360 | We have a shuttle for our service customers. Do you live or work close by? | Yes | | | DEM 0330 |
| | | No | | | DEM 0340 |
| DEM 0360 | Great, then you will be sure to take advantage of the three FREE Lube, Oil, and Filter changes we include at no extra charge with the sale of every vehicle. | Continue | | | DEM 0350 |
| DEM 0360 | Well, I'm sure you will still want to make it in for the three FREE Lube, Oil, and Filter changes we include at no extra charge with the sale of every vehicle. | Continue | | | DEM 0350 |

FIG. 31

RUN 09/10/97 15:35:40 PAGE= 8

PRINT 415 RECORDS - REPORT 022

— 10 —

| STEP | SEQ | SCRIPT TEXT | ANSWER | GOTO | PUT DATA | IN FIELD | STEP SEQ |
|------|------|---|------------------------------------|------|----------|------------|----------|
| 001 | 0010 | Welcome to ABC Motors. How may I assist you today? | We need a new car | | | | GRT 0300 |
| | | | We're just looking | | | | GRT 0300 |
| | | | How much is this c | | | | GRT 0100 |
| 002 | 0020 | I'll be happy to get you a price on a car. So, is this the car you've decided to buy? | Yes - the exact on No/Undecided | | | | GRT 0110 |
| | | | At the right price | | | | GRT 0120 |
| | | | | | | | GRT 0125 |
| 003 | 0030 | Great! Great, since you already had a chance to test drive it? | Yes - here | B | | PROSPTYPE | GRT 0130 |
| | | | Yes - elsewhere | | | | GRT 0305 |
| | | | No | | | | GRT 0120 |
| 004 | 0040 | Well, then let's make sure it's the right car before we price it for you. Because if it's not the car you want, then it doesn't matter what the price is, right? | OK | | | | GRT 0300 |
| | | | Just need a price | | | | GRT 0200 |
| 005 | 0050 | Well, then let's make sure it's the right car before we price it for you. Because if it's not the car you want, then it doesn't matter how great the price is, right? | OK | | | | GRT 0300 |
| | | | Just need a price | | | | GRT 0200 |
| 006 | 0060 | Great, welcome back. So you've already had a chance to test drive it, so some shopping. | Continue | | | | GRT 1300 |
| 007 | 0070 | Okay, tell me to get a price on this vehicle. I'll let you know you to our sales manager, who will be able to give you a price. | Continue | | | | GRT 1300 |
| 008 | 0080 | Great! Is this your first visit to ABC Motors? | Yes - First | F | | PROSPTYPE | GRT 0310 |
| | | | No - Serviced here | F | | PROSPTYPE | GRT 0320 |
| | | | No - Bought here | F | | PROSPTYPE | GRT 0320 |
| | | | No - Shopped here | B | | PROSPTYPE | GRT 0320 |
| | | | | SC | | SOURCECODE | |
| | | | | 2B | | SOURCECODE | |
| 009 | 0090 | And is this your first visit to ABC Motors? | Yes - first | F | | PROSPTYPE | GRT 1300 |
| | | | No - Serviced here | F | | PROSPTYPE | GRT 0325 |
| | | | No - Bought here | F | | PROSPTYPE | GRT 0325 |
| | | | No - Shopped here | B | | PROSPTYPE | GRT 0325 |

FIG. 32

| SC 2B | SOURCECODE SOURCECODE | |
|----------|--------------------------|--|
| | GRT 1000 | Let me explain our layout for you. New Cars are in the front. Explorers, Minivans, and New Trucks are on the side of the building. Our Pre-Owned Vehicles are displayed in the adjacent lot. |
| | GRT 1000 | Continue |
| | GRT 1300 | Continue |
| N | WANTNEWUSED | New |

FIG. 33

CLINT TST002

PRINT 415 RECORDS - REPORT 022

RUN 09/10/97 15:35:40 PAGE= 9

WO 99/14688

PCT/US98/19159

34 / 70

| STEP SEQ | SCRIPT TEXT | ANSWER | GOTO PUT DATA | IN FIELD | STEP SEQ |
|----------|---|------------------------|---------------|------------|----------|
| | Pre-Owned vehicle? | Pre-Owned Undecided | U | WANTNEWSED | GRT 1300 |
| | | | - | WANTNEWSED | GRT 1300 |
| GRT 1300 | By the way, I'm.... | Continue | | | GRT 1301 |
| GRT 1301 | What's your name? Do you mind if I write that down? | Continue | | BUYERNAME | GRT 1305 |
| GRT 1305 | This computer is great. The owner, Mr. Jones, believes that every customer should be given our best treatment possible and has asked us to use it with each visitor. Is that OK with you? | OK | | | GRT 1310 |
| GRT 1310 | Mr. Jones has also asked us to conduct a VERY SHORT SURVEY to determine which advertising sources are most effective. Your answers are so important to us that he has asked us to log every response. | Continue | | | GRT 1320 |
| GRT 1320 | First, which advertising source listed here BEST represents the reason you chose to visit our dealership? | Continue | | SOURCECODE | GRT 1330 |
| GRT 1330 | Second, what is your ZIP code? | Continue | | BUYERZIP | GRT 1340 |
| GRT 1340 | Great. THANK YOU for taking a moment to answer these two questions. | Continue | | | GRT 1350 |
| GRT 1350 | Note: When you hit CONTINUE, this script will disappear. No more scripts will display until you: 1. Hit the NEW key if this is a new prospect. 2. Hit the SEARCH key if this person has been here before. 3. Hit the CANCEL key if you want to start over. | Continue | | | GRT 9999 |

FIG. 34

PRINT 415 RECORDS - REPORT 022
 RUN 09/10/97 15:35:40 PAGE= 10

CLUT T:000

| STEP SEQ | SCRIPT TEXT | ANSWER | GOTO PUT DATA | IN FIELD | STEP SEQ |
|----------|--|--|---------------|--|--|
| PRO 0030 | I have one more question of you. It will help me understand your needs a little better. Which of the following items are most important to you in a vehicle? | Safety Performance/Mech Reliability Next/More Choices | 1 1 1 | MOTIVATION01 MOTIVATION02 MOTIVATION03 | PRO 0030 PRO 0030 PRO 0030 PRO 0031 |
| | Note: More than one answer may be selected. This screen will remain displayed until you hit 'NEXT/MORE'. | | | | |
| PRO 0031 | Note: You have NINE choices. You may look through all of the choices by using the 'Next' or 'Previous' buttons to move back and forth between the screens. | Interior Room Economy Comfort/Convenience Next/More Choices | 1 1 1 | MOTIVATION04 MOTIVATION05 MOTIVATION06 | PRO 0031 PRO 0031 PRO 0031 PRO 0032 |
| PRO 0032 | Note: When you are done with your selections, hit 'Done'. Else hit 'Previous' for more choices. | Style Off-Road Snow Done | 1 1 1 | MOTIVATION07 MOTIVATION08 MOTIVATION09 | PRO 0032 PRO 0032 PRO 0032 PRO 9999 |

FIG. 35

36/70

| CLNT TST002 | PRINT 415 RECORDS - REPORT 022 | RUN 09/10/97 15:35:40 | PAGE- 11 |
|-------------|--|-----------------------|---------------------------------|
| STEP SEQ | SCRIPT TEXT | ANSWER | GOTO PUT DATA IN FIELD STEP SEQ |
| SEL 0010 | Note: What is our next step in SELECTING a vehicle? | | |
| | 1. Enter the stock number for the vehicle we've chosen. | 1. Enter Stock# | SEL 0020 |
| | 2. I have a vehicle in mind to show, and want to see if it is available. | 2. Check Vehicle | SEL 0030 |
| | 3. Use Vehicle Search to select a vehicle. | 3. Vehicle Search | SEL 0040 |
| SEL 0020 | Enter the STOCK# of the vehicle. It is displayed on the upper right hand corner of the BAR code sticker on the windshield. The system will accept the STOCK# when you hit CONTINUE if the vehicle is available for sale. | Continue | SEL 9999 Y |
| SEL 0030 | Walk over to the vehicle you have in mind, and enter the STOCK#. The system will accept the STOCK# if the vehicle is available. | SEL UNIT1STOCKNO | SEL 9999 Y |
| SEL 0040 | 1. When you hit CONTINUE, the Vehicle Search screen will be displayed. The entries you have made regarding the prospect's wants should already be on the screen. 2. You may make further entries or you may hit SEARCH. 3. After you select the vehicle you want, click on the PRO button to begin the Product Presentation. | SEL UNIT1STOCKNO | SEL 9999 Y |

FIG. 36

SUBSTITUTE SHEET (RULE 26)

37/70

CLINT TST002 PRINT 415 RECORDS - REPORT 022 RUN 09/10/97 15:35:40 PAGE= 12

| STEP SEQ | SCRIPT TEXT | ANSWER | COTO PUT DATA | IN FIELD | STEP SEQ |
|----------|---|----------|---------------|--------------|----------|
| TRA 0005 | Before we go in.... | Continue | | | TRA 0010 |
| TRA 0010 | May we make you an offer on your trade-in? | Yes | YES | BUYERMISC1 | TRA 0040 |
| | | No | NO | BUYERMISC1 | TRA 0020 |
| | | Not Sure | NOT SURE | BUYERMISC1 | TRA 0020 |
| TRA 0020 | Naturally you are not required to accept our offer if you don't think it's fair, but at least you will get an idea of what DEALERS WILL PAY for your vehicle in the Houston market. Also, don't forget that applying your trade against the purchase price of the vehicle saves you money in TAXES. | Okay | | | TRA 0040 |
| | | No | | | TRA 0030 |
| TRA 0030 | I understand your feelings. Let's get you the figures on your new car. Right this way. | Continue | | | TRA 9999 |
| TRA 0040 | Let me collect some data about your vehicle and then tell you what the Used Vehicle Buyer is going to look at when he evaluates your trade. | Continue | | | TRA 0040 |
| TRA 0050 | What is the LICENSE plate number? | Continue | TX | TRADESTATE | TRA 0051 |
| | | Continue | | TRADELICENSE | |
| TRA 0051 | What is the LICENSE STATE? | Continue | | TRADESTATE | TRA 0060 |
| TRA 0060 | What is the ODOMETER? | Continue | AT | TRADETRANS | TRA 0070 |
| | | Continue | | TRADEHILEAGE | |
| TRA 0070 | Is this an automatic? | Continue | | TRADETRANS | TRA 0080 |
| TRA 0080 | What COLOR is it? | Continue | | TRADECOLORP | TRA 0100 |
| TRA 0100 | Enter the VIN: | Continue | | TRADEVINNUM | TRA 0110 |

FIG. 37

38/70

| TRA 0110 Ask: Do you owe anything on your trade? | Yes No Yes, but \$\$ unknown | TRA 0130 TRA 0140 TRA 0120 |
|---|--|--|
| ----- | ----- | ----- |
| TRA 0120 That's okay. We can get that information later. | Continue | TRADELIENBAL TRA 0130 |
| TRA 0130 Ask: To whom do you owe the outstanding balance? | FMCC Wells Fargo First Security Other | TRADELIENNAM TRA 0140 TRADELIENNAM TRA 0140 First Secu TRADELIENNAM TRA 0140 TRA 0131 |
| ----- | ----- | ----- |
| TRA 0131 Ask: To whom do you owe the outstanding balance? | Continue | TRA 0140 |

FIG. 38

39/70

| CLNT TST002 | PRINT 415 RECORDS - REPORT 022 | RUN 09/10/97 15:35:40 | PAGE= 13 |
|-------------|---|--|----------------------------------|
| STEP SEQ | SCRIPT TEXT | ANSWER | GOTO PUT DATA IN FIELD STEP SEQ |
| TRA 0140 | Okay, let me tell you how the Used Vehicle Buyer will evaluate on your trade, so you'll have a good idea of the process he uses. | Continue | TRA 0150 |
| TRA 0150 | First he checks the BODY for damage. This includes the Top, Hood, Fenders, Doors, Deck lid, Bumper, Grill, Paint, and Glass. | Continue | TRA 0160 |
| TRA 0160 | Next he checks the DRIVE TRAIN. This includes examining the engine and transmission, the alternator, battery and cables, starter, pump and compressor, radiator, hoses and belts, emission control, clutch, U joints, differential and exhaust system. | Continue | TRA 0170 |
| TRA 0170 | Third, he checks the RUNNING GEAR. This includes looking at each tire for wear, examining the wheels, caps and brakes. He'll look at the wheel alignment, whether the tires have been rotated properly, the steering adjustment, springs, shocks and the front end. | Continue | TRA 0180 |
| TRA 0180 | Finally, he looks over the interior. He looks at the upholstery, mats and carpet, A/C and heater, radio - tape - antenna, headliner, seats, windows, sun roof, windshield wiper and washer, instruments, horn lights - signals - lenses, tire jack and spare, and tools. | Continue | TRA 0190 |
| TRA 0190 | The reason I go into such detail on how we appraise your trade is this, we want to give you a fair price. We also want you to understand what we evaluate to make up that fair price. It includes excess mileage, wear and tear, and repairs necessary for us to turn around and sell the car to another customer like you. | Continue | TRA 0200 |
| TRA 0200 | Based on your experience with this vehicle, and what I've told you so far, how would you rate the CONDITION of this vehicle? You are not required to answer this question. | POOR (wholesale) FAIR (major recon) GOOD (recondition) | TRA 0240 TRA 0240 TRA 0240 |

FIG. 39

SUBSTITUTE SHEET (RULE 26)

40/70

| EXC (retail as is) | EXC | TRADECOND | TRA | TRA |
|--|----------|-----------|------------|-----|
| TRA 0240 Okay, that'll do it. | | | TRA 0240 | |
| | Continue | | TRA 0250 | |
| TRA 0250 I will turn in your vehicle information to our Used Vehicle Buyer and he will give us the Houston market value on the car. Will you loan me the keys for a few minutes? | Continue | | TRA 9999 Y | |

FIG. 40

41/70

CLNT TST002 PRINT 415 RECORDS - REPORT 022 RUN 09/10/97 15:35:40 PAGE= 14

| STEP SEQ | SCRIPT TEXT | ANSWER | GOTO PUT DATA | IN FIELD | STEP SEQ |
|----------|---|-----------|---------------|----------|----------------------|
| U01 0010 | Let's walk this way. Back here in service we have six SERVICE ADVISORS with a combined total of over 75 years experience in the dealership service industry. The plaques you see outside each one's office are for the customer service awards they've won. | Continue | | | U01 0020 |
| U01 0020 | Every person who works in this dealership takes an annual course on what we call the CUSTOMER-FOR-LIFE philosophy. Have you heard of it? | Yes No | | | U01 0025 U01 0030 |
| U01 0025 | Well then you already know that.... | Continue | | | U01 0030 |
| U01 0030 | The CUSTOMER-FOR-LIFE philosophy means we don't just sell you one vehicle and then never see you again. We want to follow up to make sure you are satisfied with the vehicle and with every single service experience you have at ABC Motors. We try to build a relationship with you so that you will want to come back to us. | Continue | | | U01 0045 |
| U01 0045 | This is our LUBE, OIL, FILTER center. We reconstructed it last year and have a 27 minute guarantee on getting you in and out, or your LOF is free. As you can see, you can also view the activities of the LOF center from the customer lounge. | Continue | | | U01 0050 |
| U01 0050 | Here is our CUSTOMER LOUNGE. As you see, it is equipped with free telephones, fax machine, coffee, and morning snacks for your use if you choose to wait for your vehicle while it is serviced. | Continue | | | U01 0060 |
| U01 0060 | We also have a SHUTTLE SERVICE in the mornings so you can drop your vehicle off and then go to work without waiting on your vehicle. | Continue | | | U01 0070 |
| U01 0070 | This is our CASHIER. | Continue | | | U01 0080 |
| U01 0080 | Let's go through this door to get to the front area. Now down this hallway is the picture of the dealership back in | Continue | | | U01 0090 |

FIG. 41

42/70

In 1955. We also post some of the nice letters customers
have written us on our WALL OF FAME.
Now let's go get you those figures.

0090 The water fountain and the restrooms are down that hall
If you need them. May I offer you a coke?

Continue

U01 9999 Y

FIG. 42

| PRINT REPORT | | PRINT 415 RECORDS - REPORT 072 | | RUN 09/10/97 15:35:40 | | PAGE= 15 | |
|--------------|------|---|---|-----------------------|----------|----------|--|
| STEP | REQ | PRINT TEXT | ANSWER | GOTO | PUT DATA | IN FIELD | STEP SEQ |
| 001 | 0010 | Why buy from ABC Motors? | Dealer Inventory Parts and Service Rental | | | | U02 0020 U02 0200 U02 0400 U02 0500 |
| 002 | 0020 | Choose one of the following reasons for buying at ABC Motors. "Dealer Stories" | "No Problem" Philo Mission Statement #1 Ford Volume More | | | | U02 0030 Y U02 0040 Y U02 0050 Y U02 0021 |
| 003 | 0030 | Choose one of the following reasons for buying at ABC Motors (cont'd). "Dealer Stories" | Top 100 Club #1 Jeep Volume Eagles Club More | | | | U02 0060 Y U02 0070 Y U02 0080 Y U02 0022 |
| 004 | 0040 | Choose one of the following reasons for buying at ABC Motors (cont'd). "Dealer Stories" | Top Hyundai Volume Customer Loaners Main Menu End | | | | U02 0090 Y U02 0100 Y U02 0010 U02 9999 |
| 005 | 0050 | "No Problem" Philosophy: For over 40 years, ABC Motors has had one simple goal, to exceed our customers' expectations. Our "No Problem" Philosophy means that we always look for a way to ensure that this goal is met. Our mission statement is on a card that we all carry. It was developed and approved by the over 100 employees that we have here at ABC Motors. | More Previous Menu Main Menu End | | | | U02 0040 U02 0020 U02 0010 U02 9999 |
| 006 | 0040 | Mission Statement: We at ABC Motors are fully committed to providing an automotive experience that exceeds our customers' expectations. | Continue | | | | U02 0045 |
| 007 | 0045 | Mission Statement (cont'd): Our emphasis on teamwork, combined with a high level of dedication and integrity, further define this commitment to excellence. | More Previous Menu Main Menu End | | | | U02 0050 U02 0020 U02 0010 U02 9999 |

43 / 70

FIG. 43

| | | |
|---|---|---|
| <p>-----</p> <p>Top 100 Club: We know we've been successful because....</p> <p>More people buy a Ford from us than any of the other 150 Ford dealers in the Texas region. We've been the top volume Ford dealership for the past 4 years: 1993-1996.</p> <p>-----</p> <p>Top 100 Club: We know we've been successful because....</p> <p>We're also a member of the prestigious Top 100 Club, a national award from Ford for dealers who combine outstanding volume with outstanding customer satisfaction.</p> <p>-----</p> | <p>More</p> <p>Previous Menu</p> <p>Main Menu</p> <p>End</p> <p>-----</p> <p>More</p> <p>Previous Menu</p> <p>Main Menu</p> <p>End</p> <p>-----</p> | <p>U02 0060</p> <p>U02 0020</p> <p>U02 0010</p> <p>U02 9999</p> <p>-----</p> <p>U02 0070</p> <p>U02 0020</p> <p>U02 0010</p> <p>U02 9999</p> <p>-----</p> |
|---|---|---|

FIG. 44

45/70

| | | |
|--|---|--|
| U02 0205 As you can expect, we are determined to maintain our volume leadership, and therefore will bend over backwards to ensure that you are completely satisfied with anything that we do to serve your needs. | Great Leasing/fina Over 1,000 vehicle Great Pricing More | U02 0210 Y U02 0220 Y U02 0230 Y U02 0206 |
| U02 0206 Choices cont'd. New Cars and Trucks. | Main Menu End | U02 0010 U02 9999 |
| U02 0210 New Cars and Trucks - Great leasing/financing: Our leasing and financing programs are the best available. Our #1 volume status ensures that we have the most | Continue Previous Menu Main Menu End | U02 0220 U02 0200 U02 0010 U02 9999 |

FIG. 45

46/70

CINT TST002 PRINT 415 RECORDS - REPORT 022 RUN 09/10/97 15:35:40 PAGE- 16

| STEP SEQ | SCRIPT TEXT | ANSWER | GOTO PUT DATA | IN FIELD | STEP SEQ |
|----------|---|--------------------|---------------|----------|----------|
| U02 0070 | #1 Jeep Volume: We know we've been successful because.... | More | | | U02 0080 |
| | More people buy a Jeep from us than any of the other 85 Jeep dealerships in the Texas region. We've been the top Jeep dealership for the past 2 years: 1994 and 1995. | Previous Menu | | | U02 0020 |
| | | Main Menu | | | U02 0010 |
| | | End | | | U02 9999 |
| U02 0080 | Eagles Club: We know we've been successful because.... | More | | | |
| | We're also a member of the prestigious Eagles club, a national award from Chrysler for dealers who combine outstanding volume with outstanding customer satisfaction. | Previous Menu | | | U02 0090 |
| | | Main Menu | | | U02 0020 |
| | | End | | | U02 0010 |
| | | | | | U02 9999 |
| U02 0090 | Top Hyundai Volume: We know we've been successful because.. | More | | | |
| | We are also a top Hyundai dealership with excellent satisfaction scores. | Previous Menu | | | U02 0100 |
| | | Main Menu | | | U02 0020 |
| | | End | | | U02 0010 |
| | | | | | U02 9999 |
| U02 0100 | Customer Loaners: We know we've been successful because.... | Continue | | | |
| | Our Service Department is also top-notch. In addition to top caliber technicians and equipment, we also have our Customer Loaner Program available for a small fee. This exclusive program, available only at ABC Motors, | | | | U02 0105 |
| U02 0105 | Customer Loaners: (cont'd) | More | | | |
| | provides a free rental car any time that your vehicle is in for repairs -or- maintenance, as well as giving you free TX state inspection. | Previous Menu | | | U02 0110 |
| | | Main Menu | | | U02 0020 |
| | | End | | | U02 0010 |
| | | | | | U02 9999 |
| U02 0110 | We look forward to welcoming you into our family of completely satisfied customers. We are #1 for a lot of very good reasons. Experience the ABC Motors difference. | Continue | | | |
| | | Previous Menu | | | U02 0200 |
| | | Main Menu | | | U02 0020 |
| | | End | | | U02 0010 |
| | | | | | U02 9999 |
| U02 0200 | Choose one of the following categories for buying at ABC Motors. "Inventory Stories" | New Cars and Truck | | | U02 0205 |
| | | Used Cars and Truc | | | U02 0300 |
| | | Main Menu | | | U02 0010 |
| | | End | | | U02 9999 |

FIG. 46

47/70

CLINT TST002 PRINT 415 RECORDS - REPORT 022 RUN 09/10/97 15:35:40 PAGE= 17

| STEP SEQ | SCRIPT TEXT | ANSWER | GOTO PUT DATA | IN FIELD | STEP SEQ |
|----------|---|----------------------|---------------|----------|------------|
| U02 0220 | competitive programs available for our customers. | Continue | | | U02 0230 |
| U02 0220 | New Cars and Trucks - Over 1,000 vehicles: | Previous Menu | | | U02 0200 |
| | Being the largest also means that our selection of new cars and trucks is the best around. At any point in time, we have over 1,000 new vehicles available for you to select from... this means the right vehicle for you, ready to take home with you today. | Main Menu | | | U02 0010 |
| | | End | | | U02 9999 |
| U02 0230 | New Cars and Trucks - Great Pricing: | Continue | | | U02 0240 |
| | And, of course, no one can sell as many cars and trucks as we do, without having great pricing. This combination of price and selection is just not available anywhere else in the region. | Previous Menu | | | U02 0200 |
| | | Main Menu | | | U02 0010 |
| | | End | | | U02 9999 |
| U02 0240 | ABC Motors is, therefore, the only place to buy your new car or truck. Be part of our family of completely satisfied new vehicle owners. | Continue | | | U02 0300 |
| | | Previous Menu | | | U02 0200 |
| | | Main Menu | | | U02 0010 |
| | | End | | | U02 9999 |
| U02 0300 | At ABC Motors, our reputation is at stake every time we sell a used car or truck. For years our customers have come to us expecting the finest in sales and service, and we've gone to extraordinary measures to ensure that every vehicle on the lot meets their expectations. | 200 to choose from | | | U02 0310 Y |
| | | Proud to sell | | | U02 0320 Y |
| | | Thorough recondition | | | U02 0330 Y |
| | | More | | | U02 0301 |
| U02 0301 | More choices (cont'd). Used Cars and Trucks. | 3 Month / 3,000 Mi | | | U02 0340 Y |
| | | Financed on the Sp | | | U02 0350 Y |
| | | Main Menu | | | U02 0010 |
| | | End | | | U02 9999 |
| U02 0310 | Used Cars and Trucks - 200 to choose from: | Continue | | | U02 0320 |
| | We usually carry at least \$1 million in late model, low mileage vehicles. This represents around 200 premium cars and trucks at any one time. Since we sell more new Ford's and new Jeep's than anyone else in the Texas region, and | Previous Menu | | | U02 0300 |
| | | Main Menu | | | U02 0010 |
| | | End | | | U02 9999 |

FIG. 47

48/70

are a top Hyundai dealership as well, we have our pick of
a huge volume of vehicles for resale on our lot.

U02 0320 Used Cars and Trucks - Proud to sell:

This also means that we can be very choosy about what we
offer, and we are. Any vehicles that we wouldn't be proud
to sell, we simply sell to the wholesalers, who then
re-sell to other lots.

Continue
Previous Menu
Main Menu
End

U02 0330
U02 0300
U02 0010
U02 9999

U02 0330 Used Cars and Trucks - Thoroughly recondition:

We thoroughly recondition AND clean every hand-picked used

Continue
Previous Menu
Main Menu

U02 0340
U02 0300
U02 0010

FIG. 48

49/70

CLINT TST002 PRINT 415 RECORDS - REPORT 022 RUN 09/10/97 15:35:40 PAGE= 18

| STEP SEQ | SCRIPT TEXT | ANSWER | GOTO PUT DATA | IN FIELD | STEP SEQ * |
|----------|--|--------------------|---------------|----------|------------|
| U02 0340 | car and truck that we sell, following an extensive mechanical, electrical, and cosmetic checklist. | End | | | U02 9999 |
| U02 0340 | Used Cars and Trucks - 3 month / 3,000 mile: | Continue | | | U02 0350 |
| | Each used vehicle is backed by a 3 month / 3,000 mile guarantee. Since our vehicles are so good, extended service plans are available for even longer periods of time. | Previous Menu | | | U02 0300 |
| | | Main Menu | | | U02 0010 |
| | | End | | | U02 9999 |
| U02 0350 | Used Cars and Trucks - Financing on the spot: | Continue | | | U02 0360 |
| | Financing is available right on the spot at very competitive terms, and we even have great lease programs if you want the lowest payment possible. | Previous Menu | | | U02 0300 |
| | | Main Menu | | | U02 0010 |
| | | End | | | U02 9999 |
| U02 0360 | If you are thinking of a quality pre-owned vehicle, see what impressive quality really means in a used car or truck. We look forward to welcoming you into our family of completely satisfied customers. We are #1 for a lot of very good reasons. Experience the McCafferty difference. | Continue | | | U02 0400 |
| | | Previous Menu | | | U02 0300 |
| | | Main Menu | | | U02 0010 |
| | | End | | | U02 9999 |
| U02 0400 | Choose one of the following reasons for buying at ABC Motors. | Convenient | | | U02 0410 Y |
| | Service and Parts: | Personal Advisor | | | U02 0420 Y |
| | | State-of-the-art e | | | U02 0430 Y |
| | | More | | | U02 0401 |
| U02 0401 | Choose one of the following reasons for buying at ABC Motors. | Saves Money | | | U02 0440 Y |
| | Service and Parts: (cont'd) | Accurate Repairs | | | U02 0450 Y |
| | | "Do it right" | | | U02 0460 Y |
| | | More | | | U02 0402 |
| U02 0402 | Choose one of the following reasons for buying at ABC Motors. | Main Menu | | | U02 0010 |
| | Service and Parts: (cont'd) | End | | | U02 9999 |
| U02 0410 | Service and Parts - Convenient: | Continue | | | U02 0420 |

FIG. 49

| | | |
|---|-----------------------------------|----------------------------------|
| Our Service Department is convenient for both pick-up and drop-off customers. Service is open from 7:30am to 7:30pm, Monday through Friday, and by appointment on Saturday. | Previous Menu Main Menu End | U02 0400 U02 0010 U02 9999 |
| ----- | ----- | ----- |
| U02 0420 Service and Parts - Personal Advisor: | Continue | U02 0430 |
| You will be assigned your own personal service advisor. | Previous Menu | U02 0400 |
| This means that they get to know your vehicles, and they ensure that you are completely satisfied on every visit. | Main Menu | U02 0010 |
| ----- | End | U02 9999 |
| ----- | ----- | ----- |
| U02 0430 Service and Parts - State-of-the-art: | Continue | U02 0440 |
| ----- | Previous Menu | U02 0400 |

FIG. 50

| CLINT TST002 | PRINT 415 RECORDS - REPORT 022 | RUN 09/10/97 15:35:40 | PAGE= 19 |
|--------------|--|---|--|
| STEP SEQ | SCRIPT TEXT | ANSWER | GOTO PUT DATA IN FIELD STEP SEQ |
| U02 0400 | Our factory-trained technicians always work with the latest state-of-the-art equipment. | Main Menu End | U02 0010 U02 9999 |
| U02 0440 | Service and Parts - Saves Money: This means accurate diagnostics, and efficient repair methods that save you valuable time and money. | Continue Previous Menu Main Menu End | U02 0450 U02 0400 U02 0010 U02 9999 |
| U02 0450 | Service and Parts - Accurate Repairs: We have over 40 service technicians and a HUGE inventory of parts available for every level of repair. This means prompt and accurate handling of any service needs that you have. | Continue Previous Menu Main Menu End | U02 0460 U02 0400 U02 0010 U02 9999 |
| U02 0460 | Service and Parts - "Do it right": This caring attention to your service needs is a tradition that we've maintained since our founding in 1955, and is one of our primary reasons for our success over 40 years. We are dedicated to the "do it right the first time, every time" philosophy. | Continue Previous Menu Main Menu End | U02 0470 U02 0400 U02 0010 U02 9999 |
| U02 0470 | We look forward to your visit. We are devoted to your complete satisfaction. | Continue Previous Menu Main Menu End | U02 0500 U02 0400 U02 0010 U02 9999 |
| U02 0500 | Choose one of the following reasons for buying at ABC Motors. We take our Rental Department very seriously. If your impression of dealership rental departments is that they aren't REALLY in the business, prepare for us to exceed your expectations. | 200 Vehicles Competitive Rates Convenient More | U02 0510 Y U02 0520 Y U02 0530 Y U02 0501 |
| U02 0501 | Choose one of the following reasons for buying at ABC Motors. (cont'd) | Top Choice Main Menu | U02 0540 Y U02 0010 |

FIG. 51

| | |
|--|----------------------------|
| <p>-----</p> <p>U02 0510 Rental - 200 vehicles:</p> <p>We take our Rental Department very seriously. If your impression of dealership rental departments is that they aren't REALLY in the business, prepare for us to exceed your expectations.</p> <p>-----</p> <p>We offer a full range of over 200 Ford and Jeep/Eagle cars and trucks as well as specialty vehicles such as:</p> <ul style="list-style-type: none"> * 4x4's * Luxury Conversion vans (TV's, VCR's) * Cargo vans * 15 Passenger vans * Convertibles <p>-----</p> <p>U02 0520 Continue</p> <p>U02 0500 Previous Menu</p> <p>U02 0010 Main Menu</p> <p>U02 9999 End</p> | <p>End</p> <p>U02 9999</p> |
|--|----------------------------|

FIG. 52

| PRINT 415 RECORDS - REPORT 022 | | RUN 09/10/97 15:35:40 | | PAGE= 20 | |
|--------------------------------|---|---|---------------|----------|--|
| STEP SEQ | SCRIPT TEXT | ANSWER | GOTO PUT DATA | IN FIELD | STEP SEQ |
| U02 0520 | Rental - Competitive Rates: We have very competitive rates. Deeply discounted weekly and monthly rates are also available for your convenience. | Continue Previous Menu Main Menu End | | | U02 0530 U02 0500 U02 0010 U02 9999 |
| U02 0530 | Rental - Convenient: We are open the same hours as the dealership, offering very convenient pick-up and drop-off, early in the morning or late in the evening. | Continue Previous Menu Main Menu End | | | U02 0540 U02 0500 U02 0010 U02 9999 |
| U02 0540 | Rental - Top Choice: If you need short term transportation, ABC Motors is your top choice. | Continue Previous Menu Main Menu End | | | U02 0550 U02 0500 U02 0010 U02 9999 |
| U02 0550 | We are dedicated to your complete satisfaction. | Previous Menu Main Menu End | | | U02 0500 U02 0010 U02 9999 |

FIG. 53

WO 99/14688

PCT/US98/19159

54 / 70

| STEP SEQ | SCRIPT TEXT | ANSWER | GOTO PUT DATA | IN FIELD | STEP SEQ |
|----------|--|----------------------------|---------------|----------------------------|--|
| WAN 1320 | Do you mind if I ask you a few questions about your automotive needs? | Go ahead No | | | WAN 1400 WAN 1330 WAN 1330 WAN 1340 |
| | What we can do is full out the questions together on this computer, then we'll have a better idea of what you want. | Why? Not much time avai | | | |
| WAN 1330 | I have found that by getting all of this down on the computer, I gain a better sense of your needs. Plus, we'll easily be able to pull it back up should you return to us or call back at a later date. So, will it be all right if I ask you a few questions? | Yes No | | | WAN 1400 WAN 1350 |
| WAN 1340 | I have found that by better learning what your needs are, we can SAVE YOU TIME in finding the perfect vehicle. Plus, by making note of your needs, you won't have to spend time re-explaining what you want when you call or return at a later date. So will it be all right if I ask a few questions? | Yes No | | | WAN 1400 WAN 1350 |
| WAN 1350 | That's fine. I respect your wishes. | Yes No | | | SEL 9999 WAN 1380 |
| | Do you have any questions that I can answer? | | | | |
| WAN 1360 | Well, my name is.... If you need any assistance I'll be standing out in front of the showroom, please don't hesitate to call out to me. Also, here's my card if you decide you have questions about our inventory when you get home. | Continue | | | SEL 9999 |
| | | | BEB | | |
| WAN 1400 | Do you already have a particular vehicle in mind? | Right here Yes No | | | WAN 1405 WAN 1450 WAN 1450 |
| WAN 1405 | Great, let me enter the stock number and vehicle information. | Continue | | | WAN 1410 |
| WAN 1410 | Is the vehicle new or used? | New | N | UNIT STOCKNO WANTNEWSED | WAN 1415 |

FIG. 54

| Used | U | WANTNEWUSED | WAN | 1415 |
|---|------|--------------|-----|------|
| What is the make of the vehicle you are entering? | FORD | WANTCARMAKE | | |
| Continue | | | WAN | 1420 |
| What is the vehicle a Car or a Truck? | | WANTCARMAKE | | |
| Car | C | WANTCARTRUCK | WAN | 1425 |
| Truck | T | WANTCARTRUCK | WAN | 1425 |
| Continue | | | WAN | 1500 |
| What year is the vehicle? | | WANTCARYRLO | | |
| New | N | WANTNEWUSED | WAN | 1455 |
| Are you interested in a New Ford product or a | | | | |

FIG. 55

WO 99/14688

PCT/US98/19159

56 / 70

| STEP SEQ | SCRIPT TEXT | ANSWER | GOTO | PUT DATA | IN FIELD | STEP SEQ |
|----------|---|---------------------------------------|------------------|----------|--|--|
| --- | --- | --- | --- | --- | --- | --- |
| --- | Pre-Owned vehicle? | Used Haven't decided | U - | FORD | WANTNEWSED WANTNEWSED WANTCARMAKE | WAN 1455 WAN 1455 |
| --- | --- | --- | --- | --- | --- | --- |
| --- | Are you looking for a car, truck, sports utility vehicle, or minivan/van? | Car Truck Sports Utility Van | C T T T | | WANTCARTRUCK WANTCARTRUCK WANTCARTRUCK WANTCARTRUCK | WAN 1460 WAN 1460 WAN 1460 WAN 1460 |
| --- | --- | --- | --- | --- | --- | --- |
| --- | Do you have a particular MAKE in mind? | Yes No | | | WANTATVEH WANTATVEH WANTATVEH WANTATVEH | WAN 1465 WAN 1475 |
| --- | What YEAR vehicle are you looking for? Enter "oldest" year acceptable: | Continue | | | WANTCARMAKE | WAN 1470 |
| --- | Do you have a particular MODEL in mind? | Continue | | | WANTCARYRLO | WAN 1480 |
| --- | Do you prefer a particular BODY STYLE? | Yes No | | | WANTCARMODEL | WAN 1480 WAN 1480 |
| --- | What is the oldest vehicle YEAR model you will purchase? | Continue | | | WANTCARBODY | WAN 1490 |
| --- | What is the newest YEAR model you prefer? | Continue | | | WANTCARYRLO | WAN 1500 |
| --- | What MAKE of vehicle do you currently drive? | Continue | | TRA | TRADEMAKE | WAN 1520 |
| --- | And what is the MODEL of the vehicle you currently | Continue | | | | WAN 1550 |

FIG. 56

Drive?

| TRADEMODEL | YES | NO | NOT SURE | WANT | WANTHISC1 |
|---|-----|----|----------|------|-----------|
| WAN 1550 Would you be interested in TRADING that vehicle in to our dealership? | YES | NO | NOT SURE | WAN | WANTHISC1 |
| WAN 1600 What one feature do you most like about your current vehicle and really WANT on your new vehicle? (Such as 4WD, Nice Stereo, CD, power seats, alarm, leather, fuel economy). | YES | NO | NOT SURE | WAN | WANTHISC1 |
| WAN 1610 | YES | NO | NOT SURE | WAN | WANTHISC1 |

Enter WANT 1:

FIG. 57

| STEP SEQ | SCRIPT TEXT | ANSWER | GOTO PUT DATA | IN FIELD | STEP SEQ |
|----------|--|--------------------------------|---------------|-------------------------|--|
| WAN 1610 | What second feature do you most like about your current vehicle? and really WANT on your new vehicle? (Such as 4WD, Nice Stereo, CD, power seats, alarm, leather, fuel economy). | Continue | | WANTMISC2 | WAN 1620 |
| | Enter WANT 2: | | | | |
| WAN 1620 | What one feature have you never had but really want to have on your new vehicle? | Continue | | | WAN 1730 |
| | Enter WANT 3: | | | | |
| WAN 1730 | Will this vehicle be for personal use or business use? | Personal Business | N Y | BUSINESSUSE BUSINESSUSE | WAN 1800 WAN 1740 |
| WAN 1740 | What line of business are you in? | Continue Why? | | BUYERTITLEOC | WAN 1800 WAN 1741 |
| WAN 1741 | It's helpful to know if you'll be making deliveries such as flowers, or making purchases such as antiques, or sell a product which need you need to carry around, or carry clients to business appointments, or to work a ranch. | OK No Info Given | | | WAN 1800 WAN 1800 |
| WAN 1800 | Have you set your MONTHLY budget yet? | Yes Don't know | | BUYERTITLEOC | WAN 1810 WAN 1810 |
| WAN 1810 | Do any of these monthly figures come close to what you had in mind? | \$350 \$400 \$450 More Choices | 350 400 450 | BUDGET BUDGET BUDGET | WAN 1900 WAN 1900 WAN 1900 WAN 1830 |
| WAN 1830 | Write in your budgeted monthly payment. | Continue Don't know yet | | BUDGET | WAN 1900 WAN 1840 |

FIG. 58

| | | | |
|----------|---|----------|--------------|
| WAN 1840 | That's okay. I can help you figure that out later if you like. | Continue | WAN 1900 |
| --- | --- | --- | --- |
| WAN 1900 | Last question, do you have a color preference? | Continue | WAN 2000 |
| --- | --- | --- | --- |
| --- | --- | --- | WAITCARCOLOR |
| --- | --- | --- | --- |
| WAN 2000 | Based on the information you've provided me, I have a vehicle (or several vehicles) in mind which I believe will meet your needs. | Continue | WAN 9999 Y |
| --- | --- | --- | --- |
| --- | --- | --- | --- |

FIG. 59

WO 99/14688

PCT/US98/19159

60 / 70

| STEP SEQ | SCRIPT TEXT | ANSWER | GOTO PUT DATA | IN FIELD | STEP SEQ |
|----------|--|---|---------------|----------|----------------------------------|
| WRI 0010 | After seating your prospects, offer them some refreshments if you haven't already done so. Folks, can I get you a refreshment? How about some coffee or a coke? | Continue | | | WRI 0020 |
| WRI 0020 | Read through the following screens as a refresher of what to do next, then hit HIDE SCRIPT and turn the computer so you both can see the screen. Use the Prospect Offer screen to enter the info. | Continue | OFF | | WRI 0030 |
| WRI 0030 | Okay, let's enter the numbers in the computer. The selling price is _____. The Houston area market value on your trade-in is _____. With \$1000 down, let's see what your payment will be. You will now have to hit SUBMIT OFFER. We'll have to wait a moment while the computer calculates the payment. | Continue | | | WRI 0040 |
| WRI 0040 | Okay, the vehicle is available, and the payments are calculated. • For a 48 month lease, your payment would be _____. • For a 24 month lease, your payment would be _____. Which do you prefer? | Why is Lease so low Prefer Financing Prefer Leasing | | | WRI 0050 WRI 0090 WRI 0090 |
| WRI 0050 | Ford is able to offer such a low lease payment because you are only paying for the portion of the vehicle you are using. We take the price of the vehicle today and subtract the guaranteed value of the vehicle at the end of the lease. This is the amount of the vehicle you are "using", and we finance this over a 24 or 36 month period. | Interested in Lease Prefer Financing | | | WRI 0090 WRI 0090 |
| WRI 0090 | Click on the quote the prospect is most interested in. | Continue | | | WRI 0100 |
| WRI 0100 | All we need is your OK right here and we can get the paperwork started. Note: Now be SILENT. Give the customer the pen and indicate the SUBMIT OFFER button. Wait for the customer to respond first. About 10% of your customers will sign on the first offer. Don't blow it by talking. | Continue | | | WRI 0110 |

FIG. 60

| | | | | | |
|-------|---|-------|--|-------|--|
| ----- | WK1 0110 Note: Hit HIDE SCRIPT now. Hit SHOW SCRIPT when you are ready to see the script again. Hit PREVIOUS if you'd like to go back to one of the previous scripts. | ----- | OK Objections | ----- | WK1 1000 WK1 0200 |
| ----- | WK1 0200 Prospects objects to one or more of the following: | ----- | Price Terms (Rate) Trade Allowance More | ----- | WK1 0300 WK1 0400 WK1 0500 WK1 0210 |
| ----- | WK1 0210 Prospects objects to one or more of the following: (cont'd) | ----- | Payment Money Down More | ----- | WK1 0600 WK1 0700 WK1 0720 |

FIG. 61

WO 99/14688

PCT/US98/19159

62 / 70

| STEP SEQ | SCRIPT TEXT | ANSWER | GOTO PUT DATA | IN FIELD | STEP SEQ |
|----------|---|---|---------------|----------|----------|
| --- | --- | --- | --- | --- | --- |
| WRI 0220 | Prospects objects to one or more of the following: (cont'd) | Not sure | | | WRI 0600 |
| | | Not buying today | | | WRI 0810 |
| | | Spouse not here | | | WRI 0820 |
| | | Need time to think | | | WRI 0830 |
| WRI 0300 | We believe we offer our vehicles for a fair, already discounted price. What price did you have in mind? | Continue | | | WRI 0310 |
| --- | --- | --- | --- | --- | --- |
| | | | UNITISELL | | |
| WRI 0310 | Note: Hit HIDE SCRIPT and SUBMIT OFFER. | Mgmt accepts offer | | | WRI 0320 |
| | | Mgmt counter-offer | | | WRI 0330 |
| WRI 0320 | All we need is your OK right here and we can get the paperwork started. | OK | | | WRI 1000 |
| | Note: Now be SILENT. Give the customer the pen and indicate the SUBMIT OFFER button. Wait for the customer to respond first. | More Objections | | | WRI 0230 |
| --- | --- | --- | --- | --- | --- |
| WRI 0330 | Mgmt has responded with a counter-offer. All we need is your OK right here and we can get the paperwork started. | OK | | | WRI 1000 |
| | Note: Now be SILENT. Give the customer the pen and indicate the SUBMIT OFFER button. Wait for the customer to respond first. | More Objections | | | WRI 0200 |
| --- | --- | --- | --- | --- | --- |
| WRI 0400 | Of course, this rate is based on an average person's credit history. We can check your history now to determine if your credit will get you a better rate or to see if you qualify for any special financing. We can also increase the term (months) to bring the payment down. | Apply for credit Increase Term | | | WRI 0410 |
| | | | | | WRI 0430 |
| --- | --- | --- | --- | --- | --- |
| WRI 0410 | Note: Hit the CBI step button now to begin gathering data for the credit history check. Hit the WRI step button when you are ready to return to the write-up. | Continue | | | WRI 9999 |
| --- | --- | --- | --- | --- | --- |
| WRI 0430 | Note: Hit HIDE SCRIPT, change the term, and hit SUBMIT OFFER. You will then need to wait for the desk to respond. | Mgmt accepts term Mgmt counter-offer | | | WRI 0440 |
| | | | | | WRI 0450 |

FIG. 62

| | | |
|--|--|---------------------------------------|
| <p>WRI 0440 The computer has generated the new pmt. All we need is your OK right here and we can get the paperwork started. Note: Now be SILENT. Give the customer the pen and indicate the SUBMIT OFFER button. Wait for the customer to respond first.</p> | <p>OK More Objections</p> | <p>WRI 1000 WRI 0200</p> |
| <p>-----</p> | | |
| <p>WRI 0450 Mgmt has responded with a counter-offer. All we need is your OK right here and we can get the paperwork started. Note: Now be SILENT. Give the customer the pen and indicate the SUBMIT OFFER button. Wait for the customer to respond first.</p> | <p>OK More Objections</p> | <p>WRI 1000 WRI 0200</p> |
| <p>-----</p> | | |
| <p>WRI 0500 Of course, the trade value is based on the Houston market's</p> | <p>Maintenance record</p> | <p>WRI 0510</p> |

FIG. 63

CLNT TST002

PRINT 415 RECORDS - REPORT 022

RUN 09/10/97 15:35:40

PAGE= 26

| STEP SEQ | SCRIPT TEXT | ANSWER | GOTO PUT DATA | IN FIELD | STEP SEQ |
|----------|--|---|---------------|----------|----------------------------------|
| --- | --- | --- | --- | --- | --- |
| | demand for the vehicle, and the condition of the vehicle. Can you tell me anything about the vehicle which I can pass on to the Used Vehicle Buyer to increase its value? For example, can you provide us the maintenance records or allow the next owner to call you with questions about the vehicle? | Allow phone calls Both Just wants more \$\$ | | | WRI 0520 WRI 0530 WRI 0540 |
| --- | --- | --- | --- | --- | --- |
| WRI 0510 | Call the Used Vehicle Buyer. Tell him (with the customer present): My customer here is willing to provide us with maintenance records that indicate regular maintenance was performed on this vehicle. Will you allow him more money for his trade-in? | Continue | | | WRI 0570 |
| --- | --- | --- | --- | --- | --- |
| WRI 0520 | Call the Used Vehicle Buyer. Tell him (with the customer present): My customer here is willing to allow us to give the next customer his name and phone number to call if he has any questions. Will you allow him more money for his trade-in? | Continue | | | WRI 0570 |
| --- | --- | --- | --- | --- | --- |
| WRI 0530 | Call the Used Vehicle Buyer. Tell him (with the customer present): My customer here is willing to provide us with maintenance records that indicate regular maintenance was performed on this vehicle. And he is willing to allow us to give the next customer his name and phone number to call if he has any questions. Will you allow him more money for his trade-in? | Continue | | | WRI 0570 |
| --- | --- | --- | --- | --- | --- |
| WRI 0540 | How much more money do you think you need for your vehicle? | <\$500 >\$500 | | | WRI 0550 WRI 0580 |
| --- | --- | --- | --- | --- | --- |
| WRI 0550 | Call the Used Vehicle Buyer. Tell him (with the customer present): My customer doesn't have the maintenance records nor does he want a stranger calling him with questions about his old vehicle. However, he really believes his car is worth a few hundred dollars more. Is there anything you can do for him? Do you mind taking another look at the vehicle with the customer present? | Re-evaluate trade More money No more money | | | WRI 0560 WRI 0570 WRI 0580 |
| --- | --- | --- | --- | --- | --- |

FIG. 64

KKJ 0560 * If the buyer is available, say: Let's walk out to see the Available
 Used Vehicle Buyer now and we'll re-evaluate your trade-in: Not Available
 * If the buyer is not available, say: The Buyer isn't
 available now. Let's proceed with the credit process while
 we wait.

WRI 0570 Well, it looks like we can give you \$ ____ for your trade. Yes
 Is this acceptable to you? No

TRADEGROSS

WRI 0580 Well, it sounds as if you will have better luck with this Yes, trade-in
 vehicle selling it yourself, if you don't mind dealing with No, don't trade-in
 strangers or taking the chance of not selling it 0

TRADEGROSS

WRI 0590
 WRI 0580
 WRI 0570

FIG. 65

| STEP SEQ | SCRIPT TEXT | ANSWER | GOTO PUT DATA | IN FIELD | STEP SEQ |
|----------|--|--|---------------|----------|--|
| | immediately. You also have a cost associated with advertising the vehicle and you lose the tax benefit from applying the trade to the new vehicle sale price. Would you like to proceed without the trade? | | | | |
| WRI 0590 | Note: Hit HIDE SCRIPT and SUBMIT OFFER. | Mgmt accepts offer | | | WRI 0591 |
| WRI 0595 | All we need is your OK right here and we can get the paperwork started. Note: Now be SILENT. Give the customer the pen and indicate the SUBMIT OFFER button. Wait for the customer to respond first. | OK More objections | | | WRI 1000 WRI 0200 |
| WRI 0600 | Of course, there are several ways to decrease the payment. We can check your history now to determine if your credit will get you a better rate than the average rate we use as an example. We can also bump the term (months) up. You may also put more money down. | Better rate Bump term More money down Other | | | WRI 0410 WRI 0430 WRI 0700 WRI 0610 |
| WRI 0610 | More choices: | Trade allowance Price | | | WRI 0500 WRI 0300 |
| WRI 0700 | Of course, how much money would you like to put down? | Continue | | | WRI 0310 |
| WRI 0800 | Just not sure: Many people just aren't 100% sure they are making the right move when they buy a new vehicle. Perhaps I can help you pinpoint what concerns you. Is there something about the vehicle you don't like? Or is it something else? | Don't like Something else Not sure/need time | DOWNPAYMENT | | WRI 0803 WRI 0200 WRI 0801 |
| WRI 0801 | Just not sure: Well, I can understand your concern. Let me get a brochure with our prices together, you can take it home with you, and you can call me if you have any questions. That way you can consider your purchase at your leisure. | Continue | | | WRI 0802 |

FIG. 66

| | | | |
|----------|--|---|----------------------------------|
| WKI 0802 | Just not sure: Now, let's make an appointment for you to return. Would this evening or tomorrow be more convenient? | Continue | WKI 0822 |
| WKI 0803 | That wouldn't keep you from owning it, would it? | No Yes Maybe | WKI 0804 WKI 0804 WKI 0804 |
| WKI 0804 | We have three choices then. We can look for another vehicle which better suits your needs, we can let you think about this vehicle and make an appointment to come back, or you can buy this vehicle now. | Another vehicle Make appointment Buy this vehicle | WKI 0805 WKI 0801 WKI 1000 |

FIG. 67

PRINT TST002 PRINT 415 RECORDS - REPORT 022 RUN 09/10/97 15:35:40 PAGE= 28

| STEP SEQ | SCRIPT TEXT | ANSWER | GOTO PUT DATA | IN FIELD | STEP SEQ |
|----------|--|-------------------------|---------------|----------|----------------------|
| WRI 0805 | Let's find a vehicle for you that you really want. Let me check my computer to see if we have something else that better suits the needs you've described to me. | Continue | | | WRI 0806 |
| WRI 0806 | It may be necessary to switch the prospect on to another vehicle at this point. If this is the case, go back to the SEL (select) step to help them find another vehicle. Hit the SEL button now. | Continue | | | WRI 9999 |
| WRI 0810 | Not buying today: I respect that you are not planning to buy today. However, let me ask you one question. Is there any single item that is preventing you from coming to a decision today? What is that item? If we can take care of that, will you consider buying? | Yes Not buying today | | | WRI 0811 WRI 0812 |
| WRI 0811 | Not buying today: (cont'd) You may need to hit the MANAGER button now for assistance. Or you may determine based on their answer that they absolutely won't be buying today. Or you may find that you can answer their objection yourself. | Continue | | | WRI 0200 |
| WRI 0812 | Not buying today: (cont'd) I'll respect your wishes. Let's make an appointment for you to come back in when you are closer to a decision. Would tomorrow or the next day be more convenient for you? | Continue | | APPTDATE | WRI 0822 |
| WRI 0820 | Spouse not here: I can certainly appreciate the fact that you would want your spouse involved in the decision. Allow me to gather all this information together for you so you can get on your way. | Continue | | | WRI 0821 |
| WRI 0821 | Spouse not here: Let's make an appointment for you and your spouse to return together. Would this evening or tomorrow be more convenient? | Continue | | APPTDATE | WRI 0822 |

FIG. 68

| | | |
|---|--|--|
| WRI 0822 And what time would be best for you? 7pm? 7:30pm? | Continue | WRI 0823 |
| WRI 0823 Now, you will call me if something changes on your end, won't you? And I'll do the same for you if something changes on my end. Where can I reach you or your answering machine? | HOME PHONE WORK PHONE CELL PHONE NO PHONE GIVEN | WRI 0825 WRI 0826 WRI 0827 WRI 0828 |
| WRI 0825 Home phone: | Continue | WRI 0828 |
| WRI 0826 Work phone: | Work# also given | WRI 0826 |
| | Continue | WRI 0828 |

FIG. 69

CLNT TST002 PRINT 415 RECORDS - REPORT 022 RUN 09/10/97 15:35:40 PAGE= 29

| STEP SEQ | SCRIPT TEXT | ANSWER | GOTO PUT DATA | IN FIELD | STEP SEQ |
|----------|---|--|---------------|----------|----------------------------------|
| --- | --- | --- | --- | --- | --- |
| WRI 0827 | Cell phone: | Cell# also given | | | WRI 0827 |
| --- | --- | --- | --- | --- | --- |
| --- | --- | Continue | | | WRI 0828 |
| --- | --- | Home# also given | | | WRI 0825 |
| --- | --- | --- | --- | --- | --- |
| WRI 0828 | Great, I'll see you then. | Continue | | | WRI 0829 |
| --- | --- | --- | --- | --- | --- |
| WRI 0829 | Note: Walk the prospect out, and if you aren't sure of their biggest obstacle to purchase, ask the following.... I'd like to ask one last question of you. When you go home to think about this decision, what will be your biggest concern? Perhaps I'll be able to think of a way to address it before you return. | Continue | | | WRI 0999 |
| --- | --- | --- | --- | --- | --- |
| WRI 0830 | Need time to think: Take all the time you need. Why don't I leave you alone for a moment to process everything. Can I get you anything while I'm up? | OK - ready to sign Still need time More objections | | | WRI 1000 WRI 0840 WRI 0200 |
| --- | --- | --- | --- | --- | --- |
| WRI 0840 | Still need more time: (cont'd) I'll respect your wishes. Let's make an appointment for you to come back in when you are closer to a decision. Would tomorrow or the next day be more convenient for you? | Continue | | APPTDATE | WRI 0822 |
| --- | --- | --- | --- | --- | --- |
| WRI 1000 | Note: Congratulations on completing the write-up step. The next step is the credit application process. | Continue | | | WRI 9999 |
| --- | --- | --- | --- | --- | --- |

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FIG. 70

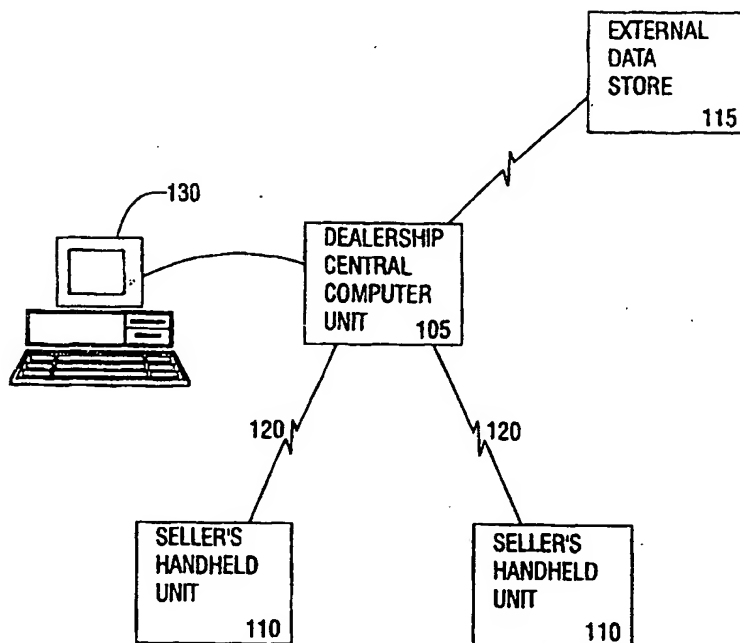
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| (30) Priority Data: 08/929,929 15 September 1997 (15.09.97) US | | | |
| (71) Applicant (for all designated States except US): ROSEFAIRE DEVELOPMENT LTD. [-/-]; 33 Church Street, Hamilton (BM). | | | |
| (72) Inventors; and (75) Inventors/Applicants (for US only): BROCKMAN, Robert, T. [US/US]; 903 Oak Valley, Houston, TX 77024 (US). JONES, Donald, D. [-/-]; Suite 235, 8 South Shore Road, Smiths, FL 05 (BM). | | | |
| (74) Agent: PYLE, Jeffrey, A.; Arnold, White & Durkee, P.O. Box 4433, Houston, TX 77210 (US). | | Published <i>With international search report.</i> <i>Before the expiration of the time limit for amending the claims and to be republished in the event of the receipt of amendments.</i> | |
| | | (88) Date of publication of the international search report: 10 June 1999 (10.06.99) | |

(54) Title: PORTABLE SALES PRESENTATION SYSTEM WITH SELECTIVE SCRIPTED SELLER PROMPTS**(57) Abstract**

A handheld computer unit for use by, e.g., a car sales person (seller) prompts the seller with a standard script to be followed at each step in the process after a prospect enters a dealership. The prospect's response to the scripted questions is used to identify the prospect's particular interests of a general nature, e.g., safety, and of a specific nature, e.g., trailer towing capacity. When either a general or specific interest is identified, the seller is prompted to tailor the conversation to address the prospect's interests. Among other things, the handheld unit can perform functions such as (i) permitting the seller to retrieve useful information such as inventory availability from a sales information data store; (ii) displaying option-sensitive prompts to aid the seller in discussing specific vehicles under consideration; (iii) accessing remote communications links to external data sources to obtain information on credit-worthiness of the prospect, financing terms, and availability; (iv) displaying motivational information such as the percentage likelihood of consummating the sale successfully; (v) providing a communications link with management personnel.



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INTERNATIONAL SEARCH REPORT

International Application No

PCT/US 98/19159

A. CLASSIFICATION OF SUBJECT MATTER
IPC 6 G06F17/60

According to International Patent Classification (IPC) or to both national classification and IPC

B. FIELDS SEARCHED

Minimum documentation searched (classification system followed by classification symbols)
IPC 6 G06F

Documentation searched other than minimum documentation to the extent that such documents are included in the fields searched

Electronic data base consulted during the international search (name of data base and, where practical, search terms used)

C. DOCUMENTS CONSIDERED TO BE RELEVANT

| Category * | Citation of document, with indication, where appropriate, of the relevant passages | Relevant to claim No. |
|------------|---|-----------------------|
| X | WO 97 26610 A (BLAND PARTNERSHIP ; BROCKMAN ROBERT T (US); JONES DONALD D (US)) 24 July 1997 see abstract; claims 1-36; figure 1 see page 1, line 3 - page 14, line 25 --- | 1-47 |
| A | US 5 493 490 A (JOHNSON JEROME D) 20 February 1996 see abstract; claims 1-32; figures 1-4, 6-11, 22 see column 1, line 16 - column 39, line 50 --- | 1-47 |
| A | CAMPANELLI M: "SOUND THE ALARM" SALES AND MARKETING MANAGEMENT, no. PART 02, December 1994, pages 20-22, 24/25, XP002034775 see the whole document --- | 1-47 |
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☒ Further documents are listed in the continuation of box C.

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Date of the actual completion of the international search

20 April 1999

Date of mailing of the international search report

27/04/1999

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INTERNATIONAL SEARCH REPORT

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C.(Continuation) DOCUMENTS CONSIDERED TO BE RELEVANT

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| A | US 5 576 951 A (LOCKWOOD LAWRENCE B) 19 November 1996 see abstract; figures 1,6-9,14 see column 1, line 31 - column 23, line 41 ----- | 1-47 |

INTERNATIONAL SEARCH REPORT

Information on patent family members

Internat. Application No

PCT/US 98/19159

| Patent document cited in search report | Publication date | Patent family member(s) | Publication date |
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